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## ABSTRACT

This guide, which was developed with input from more than 120 Job Training Partnership Act (JTPA) programs across the United States, is designed to give JTPA program staff new ideas for conducting their targeting, outreach, and recruitment efforts. Presented first are an overview of the guide's contents and suggestions for using it. The first five chapters deal with system planning, targeting, marketing plan development, outreach, and recruitment. Each chapter contains the following: chapter contents, brief introduction and definition of the concept underlying the activity, description of the activity's purpose and intent, suggested methods/techniques, ideas regarding managing the activity/function, and a complete listing of relevant citations from the JTPA and other regulations. Included in the sixth chapter are ideas for the following: developing posters, logos, and display advertising; obtaining media coverage; and organizing promotional events and other related activities. The final chapter consists of project-specific examples of targeting, marketing, outreach, and recruitment activities that have proved successful with the following client groups: adults, displaced homemakers, ex-offenders, homeless people, minority group members, most-in-need and hard-to-serve clients, and youth. Appended are lists of contributors to the guide, Department of Labor Regional Office contacts, and the project customer focus panel members. (MN)

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# JTPA: Targeting, Outreach and Recruitment



A Technical Assistance and Training Series

U.S. Department of Labor  
Employment and Training Administration  
1993

ED 375 250

J T P A

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## FOREWORD

Changing expectations for government are an integral part of our current reality. Changing realities require changing relationships. Within the employment and training community, new partnerships are forming, and new roles are emerging.

The traditional process by which we have designed and delivered technical assistance is a process ripe for change. We have chosen to be active participants in the process of change, and we are grateful to have had the opportunity to test a new process to design and deliver technical assistance.

Within our region, we have adopted the following definition:

*Technical assistance is a quality driven process by which ETA and its customers work in partnership to continually improve Employment and Training programs.*

This definition served as a credo for us as we worked on the *Comprehensive Resource Guide (CRG)* for *Targeting, Outreach, and Recruitment*. Those with whom we have worked have taught us the meaning of these words.

To be "a quality driven process," technical assistance must be focused rigorously and continuously on the needs of our customers. Our customer cannot be limited to the layer next up or next down in the chain of command. Our customer is a participant. And the participant's customer is an employer. The *Guide* puts the needs of the participant first.

To be successful "ETA and its customers [must] work in partnership." To develop the *Guide* "in partnership" meant including state and SDA staff in *Guide* design, development and delivery decisions; forming and involving an expert panel of state and SDA staff to guide decisions regarding the subject and scope of the *Guide*; conducting surveys of all regional offices, states and SDAs before determining the content of the *Guide*; and conducting surveys of all regional offices, states and SDAs to identify exemplary systems and individual experts to be included in the *Guide*.

"Work in partnership to continually improve Employment and Training programs," means learning from one another. To improve, we must find better ways to manage the system strategically, to target more precisely, to reach out more effectively and to recruit more efficiently. To find better ways, we need look no further than our peers. The training which will accompany the *Guide* is based on the simple premise that we can learn best from the experience and expertise of other employment and training



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professionals. As trainers in the areas of targeting, outreach, and recruitment, our job will be to create an environment in which employment and training professionals can learn from each other.

Today the employment and training community confronts challenges and opportunities of historical significance. We must seek opportunities, both large and small, to become activists in the change process. By working together and learning from one another, we can change challenges into opportunities and opportunities into improvements.

Armando Quiroz  
Employment & Training Administration  
Regional Administrator  
Seattle, Washington

July 1993

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# INTRODUCTION



## PREFACE

Why a Guide on Targeting, Outreach, and Recruitment? In the Spring of 1992, the Department of Labor (DOL) announced plans for a technical assistance and training series for JTPA dealing with critical program areas such as Youth and Adult Assessment, Case Management, Out-of-School Youth, SDA Monitoring of Service Providers, On-the-Job Training, Eligibility Determination and Targeting, Outreach, and Recruitment. Officials at the Department of Labor saw the targeting, outreach and recruitment area as a new opportunity for a partnership project between a DOL Regional Office and the field. The Employment and Training Administration's (ETA's) Seattle Regional Office volunteered to take lead responsibility for the project because it personified the agency's vision and mission:

*To promote new ideas, add value, and make a difference  
on behalf of America's workforce in partnership with our  
customers.*

Based on this philosophy, the Targeting, Outreach, and Recruitment Project created a team of both regional and State people which began early to involve a sample of customers in an information exchange to identify needs, experts and model systems. This Guide is the product of that and other information-generating activities. It is provided to States and Service Delivery Areas to enhance targeting, outreach and recruitment activities necessary to meet the increased emphasis for serving those with serious barriers to employment.

All information contained in this guide is the property of the U.S. Government. You are encouraged to copy and distribute any information contained in this Guide for the purpose of improving your targeting, outreach, and recruitment efforts.

This Guide has been developed as a result of the changes brought about by the passage of the Job Training Reform Amendments of 1992. The Guide has been distributed to employment and training organizations throughout the country including JTPA Service Delivery Areas, State JTPA Offices, State Employment Security Agencies, and Department of Labor Regional Offices. Requests for additional copies of this publication and any questions concerning information in this Guide should be addressed to:



Hugh Davies  
U.S. Department of Labor  
Employment and Training Administration  
Room N-4469, 200 Constitution Avenue, NW  
Washington, D.C. 20210  
(202) 219-5580



## ACKNOWLEDGMENTS

This Comprehensive Resource Guide is the result of a joint effort between the U.S. Department of Labor, Employment and Training Administration, Region X (Seattle) and the Oregon Job Training Partnership Administration, Economic Development Department.

### PROJECT TOR TEAM:

#### U.S. DOL SEATTLE

Orville Arbogast  
Michael Brauser  
Billie Ann Davis  
Rosemary Kafara-Cowan  
Joe Valek

#### OREGON, JTPA

Bill Easley  
Pat Newport

#### AUTHORS FOR THE PRINCIPAL CHAPTERS OF THE GUIDE

**System Planning:** TOR Team Members, Seattle  
**Targeting:** David Snedeker, Bainbridge Island, Washington  
**Marketing Plan:** Pat Newport, Corvallis, Oregon; Robin Widing, Philadelphia, Pennsylvania  
**Outreach:** Robin Widing, Philadelphia, Pennsylvania  
**Recruitment:** Cathy Fyock, Prospect, Kentucky

The Project TOR Team is particularly grateful to the more than 120 JTPA Service Delivery Areas who responded to our targeting, outreach, and recruitment questionnaires. Their responses formed the basis for this Guide.

We also wish to thank members of our Project TOR Customer Focus Panel, JTPA experts from across the country, who guided Project TOR in its inception and provided valuable input to draft documents to assure that the materials would meet the needs of our customers. Members of the panel are listed in the Appendix.

The Project TOR Team also wishes to acknowledge representatives of the Department of Labor Regional Offices for their assistance in gathering success stories and professionals to feature in our Guide and for their comments on our final draft.

And finally, special thanks to: Suzette Boydston for her timeless work in contacting projects and professionals throughout the country; Cheryl McLean of Imprint Services, Corvallis, Oregon, for formatting the Comprehensive Resource Guide and accompanying Project TOR materials; and to our customers... JTPA Service Delivery Areas and programs across the nation who provided the success stories and professionals featured in this Guide.





## INTRODUCTION

Welcome to the Targeting, Outreach, and Recruitment Comprehensive Resource Guide...or the TOR CRG! With the input of more than 120 JTPA programs representing all regions, we have produced this Guide as a tool for JTPA program staff who want some fresh new ideas for their targeting, outreach, and recruitment efforts. The Guide offers detailed definitions of these functions, rationale for the importance of focusing on them, and numerous examples for you to borrow to enhance your efforts in targeting, outreach, and recruitment.

The first step in developing the CRG was to use one of the basic Total Quality Management principles... we asked our customers! Questionnaires were sent to many Service Delivery Areas (SDAs) in June and every SDA in August of 1992 to find out what you needed to enhance your targeting, outreach, and recruitment efforts. We asked you what information you wanted, which format would be most useful, and what targeting, outreach, and recruitment ideas work for you, so that we could share them with your colleagues.

The response was encouraging... more than 120 programs offered their ideas, frustrations, questions, and comments. Not surprisingly, responses revealed many interpretations of what constitutes targeting, outreach, and recruitment activities. What one called outreach, another called recruitment. Some respondents confided that they don't do targeting; many lamented that strained budgets challenge them to create effective yet inexpensive efforts to reach their publics.

## WHAT'S IN THE GUIDE?

As with many projects of this size and scope, Project TOR "took on a life of its own." Our first outline of key concepts was refined over and over as the Project TOR Team received information from programs, sifted through questionnaires, involved the panel of experts, and grappled with concepts, definitions, and practices for targeting, outreach, and recruitment.

The result? A truly comprehensive guide beginning with a look at System Planning — how it affects your entire program and then specifically how it relates to targeting, outreach, and recruitment. Then we move to Targeting and address the importance of this activity and how, if done well, it can improve your decisions about who is most needy and can benefit from your services.

We then digress for a chapter on the Marketing Plan to describe how public relations, outreach, and recruitment can fit neatly into a plan and assure that your program maximizes resources while delivering a positive and consistent message to your audiences. Following this, *Outreach and Recruitment are treated in detail with definitions, concepts, and many examples for you to use. These three chapters should be of special interest to marketing and program delivery staff.*

Each chapter follows a similar format, beginning with a short introduction and definition of the concept. A description of the purpose and intent is next, followed by a presentation of methods and



## **I N T R O D U C T I O N**

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techniques. Ideas for how to manage the particular function are addressed. And finally, each chapter ends with a complete listing of citations from the Job Training Partnership Act and regulations that readers may find helpful.

Because of the great response to our request for success stories and professionals, we are able to include many examples for you to draw on. Some are mentioned in the narrative of each chapter; others are featured in the Working Examples section of each chapter. Some are included in a special section on Model Projects in the back of the Guide.

The examples and experts included in the Guide cover the whole spectrum of programs — large and small, rural and urban. We would like to think that regardless of the size, sophistication, or scope of your program, you'll find many useful ideas in the Guide!

Please note the special section: **Great TOR Ideas**. This includes ideas from across the country to help spark your imagination, rouse your creativity, and borrow great ideas from your colleagues. Thanks again to the many programs that made this section possible!

### **WHAT'S THE BEST WAY TO USE THE GUIDE?**

Of course, we would hope you'd feel compelled to read the TOR Comprehensive Resource Guide from cover to cover; but, it's probably more realistic to suggest that you familiarize yourself with the contents generally, and then refer to it as a resource in your planning activities and day-to-day operations.

PIC members, SDA Directors, and other managers will be particularly interested in the System Planning section. We encourage you to make the Guide available to other staff members involved in any aspect of planning, targeting, public relations, outreach, and recruitment.

We invite you to browse through the Guide, read it, copy it, and distribute it, with the hope that it will strengthen your targeting, outreach, and recruitment activities!



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# SYSTEM PLANNING



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## ► INTRODUCTION TO SYSTEM PLANNING

Why System Planning? The System Planning chapter was conceived as a way to set the stage for the information which we received from JTPA Service Delivery Areas throughout the country for a Comprehensive Resource Guide on Targeting, Outreach, and Recruitment (TOR). It became clear to us, as we collected and analyzed the responses, that the Guide would need to place targeting, outreach, and recruitment within the context of other processes operating within a local job training system. After seeing the larger picture, the important role TOR plays in both planning and program operations should be more apparent.

The first part of this chapter discusses TOR as a subcomponent within the larger JTPA system. Using a flow process diagram of a local job training system, the chapter then explores the cause and effect relationships between TOR and other system processes and explains how TOR planning might influence program design and operation decisions. A typical JTPA Participant Flow is used to illustrate other cause and effect relationships. The Methods and Techniques section suggests a "Classical Model" planning sequence; the sequence which the JTPA anticipates that SDAs will follow in planning local programs. Four other planning sequences, used by SDAs throughout the country, are also discussed and compared to the "Classical Model." The final and key section, Managing the Function, is designed to challenge local PICs to examine how and where they can get involved to make whatever adjustments are necessary to guide their local job training systems more effectively.

Throughout this chapter, TOR is oftentimes treated as a single concept; although we do recognize it as three different functions, with targeting being primarily a strategic planning function, and outreach and recruitment being the first functions in the program operations process.

## ► DEFINITION OF SYSTEM PLANNING

*System Planning is a strategic process for designing the sequence and interconnections among processes and functions operating within a local job training system in order to fulfill the mission and vision of the organization.*

The definition uses two key terms: *system* and *planning*.

A *system* is a group of interrelated processes or parts used by one or more organizations to attain a desired outcome or objective. Key aspects of a system are the interrelatedness of its parts, the shared purpose, and the idea of holism.

*Planning* is the means for systems to sequence, coordinate, and allocate resources for the various subsystems and their processes. Planning is universally recognized as an essential function related to the management of any program, enterprise or organization.

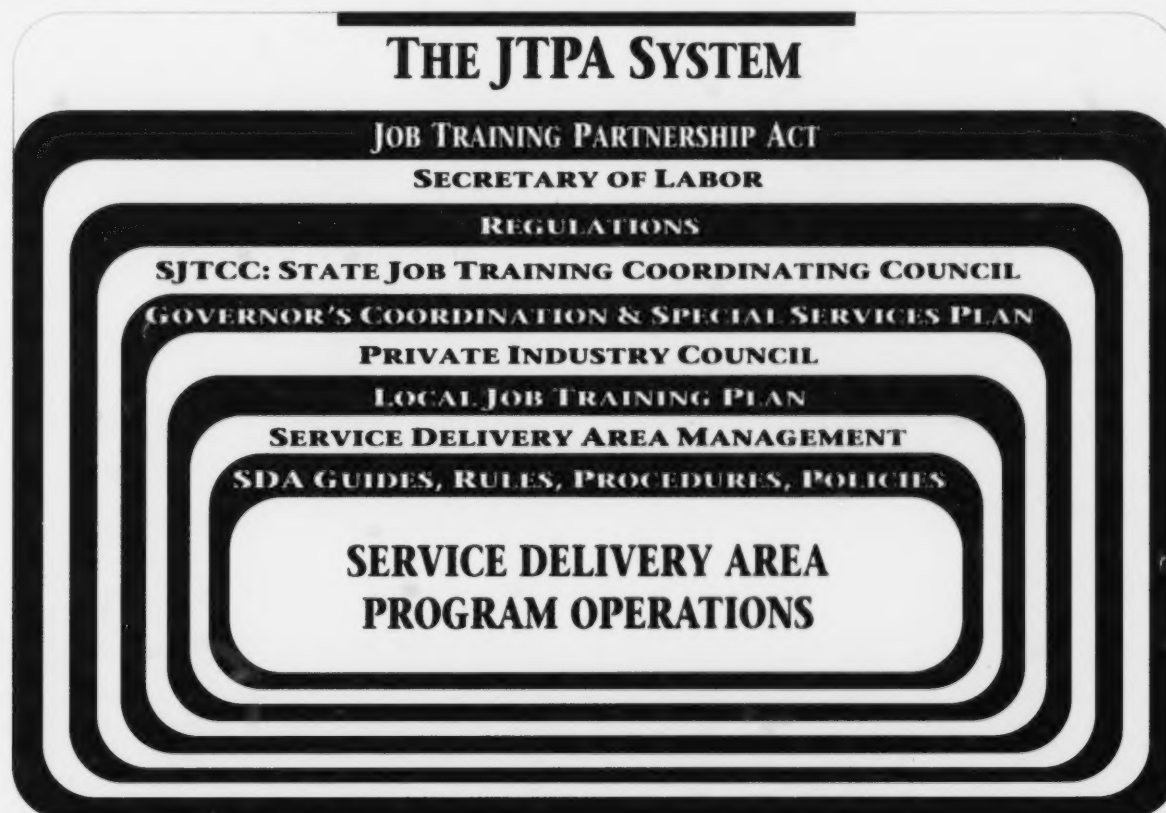
System planning, then, is the "umbrella" which links the PIC's mission and vision to the establishment of goals, objectives, and action plans which will guide program operations.

## ► PURPOSE AND INTENT OF SYSTEM PLANNING

System planning makes it possible for SDAs and PICs to:

- *Direct individual efforts to achieve a common vision*
- *Establish basic organizational and administrative goals*
- *Develop action plans and assign responsibilities*

Let's take a minute to reflect on our system. When we think of the JTPA system on a national scale, it is made up of the various national, state and local organizations and processes with the objective to accomplish the purpose of the Job Training Partnership Act. As shown below, our JTPA system is made up of a variety of key organizations and policy making, planning and operational processes.



The recent JTPA Amendments have affected all parts of the system, including the important functions of targeting, outreach, and recruitment that fall within SDA program operations.

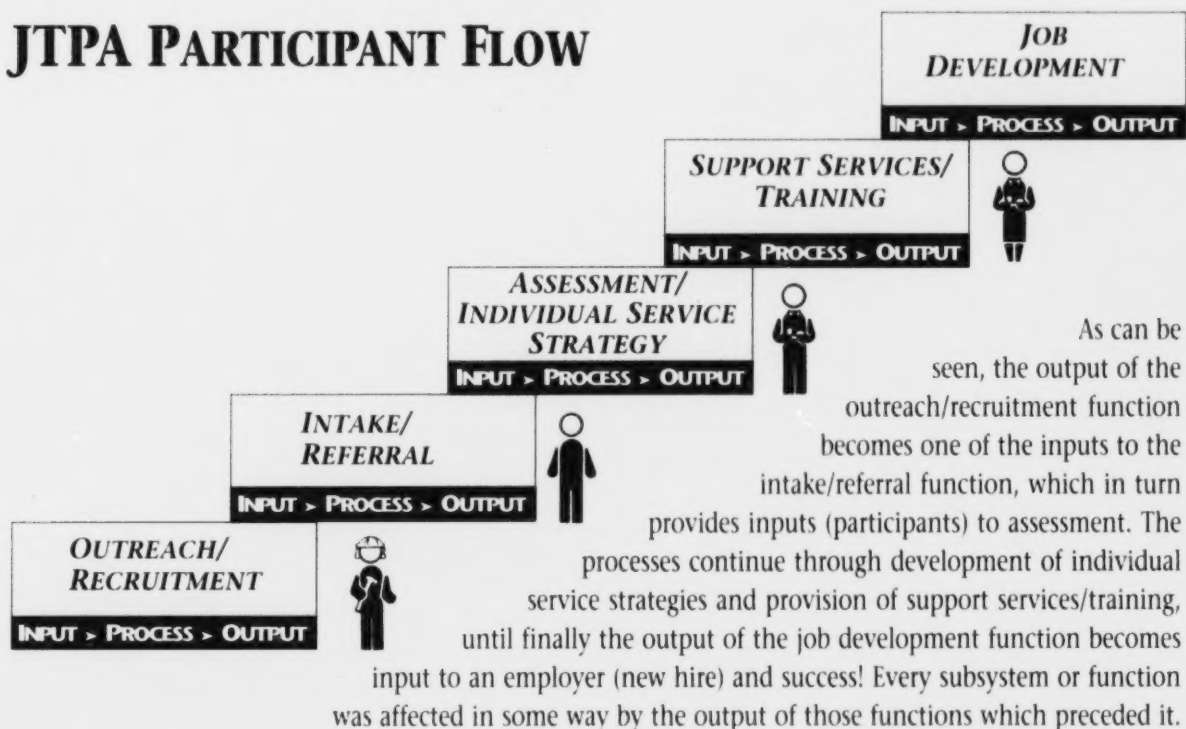


## SYSTEM PLANNING

Within the local job training system are numerous subsystems and their components which make up the **whole**. Targeting, Outreach and Recruitment are functions of the local job training system whose components are intrinsically **interrelated** to various other systems and processes operating within the broader system wide context. When we think of the local JTPA system, we may tend to think of it in isolation. Too often, systems and components of other systems are viewed singularly and not as part of the larger system. And, while each part of a system is important, it is really the **linkage** or **interconnectivity** among the parts and the cause and effect relationships between the functions which make it possible for the system to operate smoothly or, conversely, to become inoperable.

How does a system work? Basically, all parts in a system share a drive toward achieving a predetermined objective. Nationally this could be the purpose of JTPA; but locally it would be the mission and vision set forth by the PIC. Each subsystem can be thought of as operating within the context of a simple Input ► Process ► Output (IPO) model, and the interrelated nature of the system's parts create a flow from one to another until the final vision is achieved. The interdependence of the system's parts creates a cause and effect relationship where the output from one function becomes part of the input to the next function. The Input ► Process ► Output concept is useful in that it can illustrate the interconnectedness of various subsystems and functions which may make up a larger system. In the local job training system, there are a number of subsystems operating where the output-becomes-input relationship can be illustrated. The figure below presents an example of the Input ► Process ► Output, cause and effect relationship for participant flow.

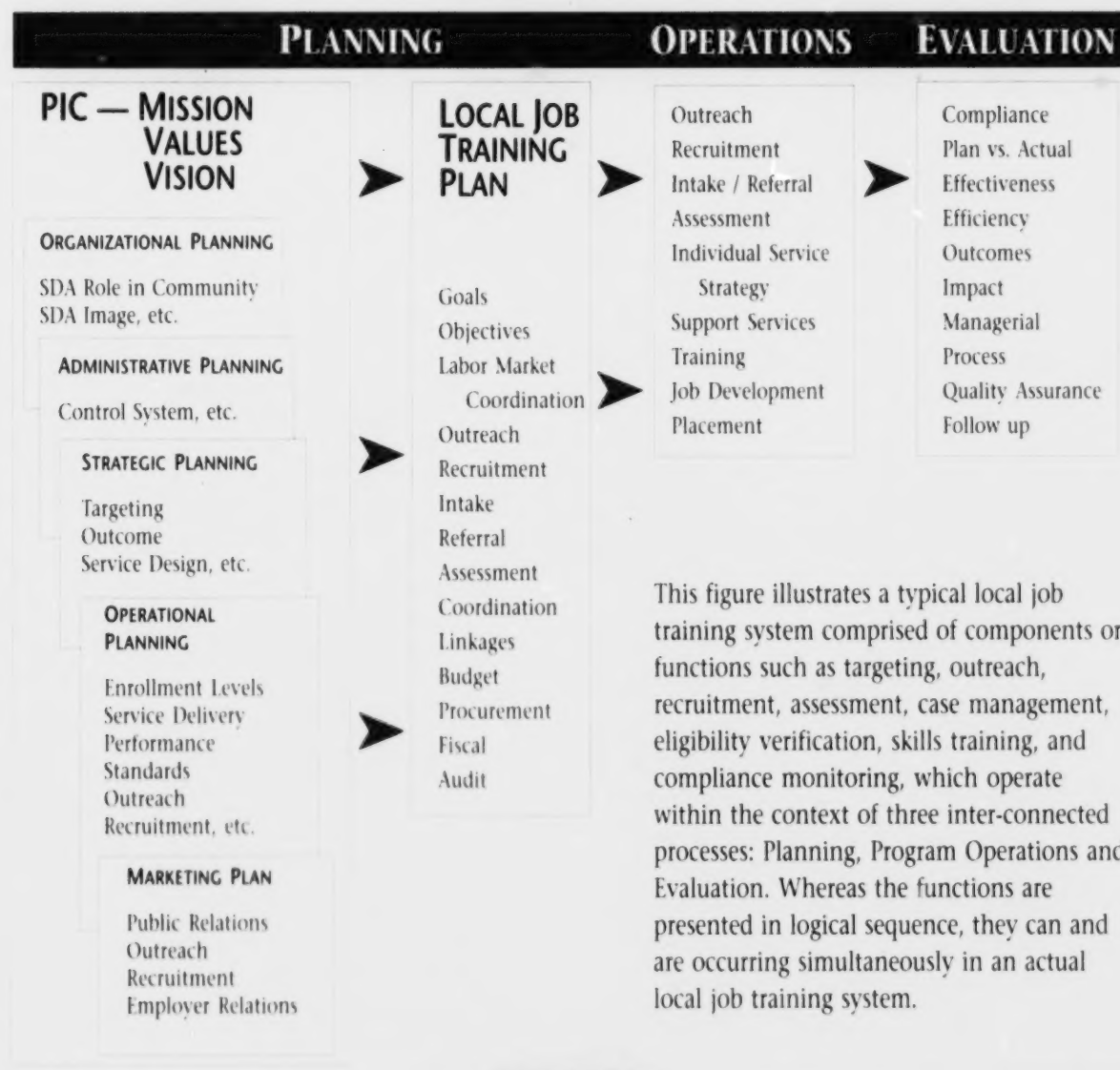
### JTPA PARTICIPANT FLOW



## SYSTEM PLANNING

Systems can be affected by both internal and external forces. Internal forces are created when new or revised input is received and processed as a result of outside change or from feedback within the system itself. External forces affect the environment of a system, such as the state of the economy, the rate of inflation, or international events. All components in an interrelated system affect, and are affected by, other functions or subsystems within that larger system. Changes in a subsystem will affect the entire system. An obvious example is the tremendous amount of change throughout the entire system created as a result of the amendments to JTPA. One of the key changes in the Act relates to revising current processes to ensure better targeting to serve those who are most-in-need. All subsystems will be affected by this change.

### THE LOCAL JOB TRAINING SYSTEM



## SYSTEM PLANNING

The planning approach depicted is comprised of a five-phase process:

- *Organizational Planning*
- *Administrative Planning*
- *Strategic Planning*
- *Operational Planning*
- *Written plans for marketing and local job training service delivery*

This approach assumes and depends on the development of a system design which flows out of the PIC's *Mission, Values and Vision*. The mission, values and vision form the operating framework upon which local job training planning strategies and program objectives are built.

1. The process of *Organizational Planning* defines the purpose and scope of the local job training program within the context of the broader community. Through the organizational planning process, the PIC's role in the community is identified, as are the broad policies for administering the program. The following is an example of a broad organizational goal:

*To position the PIC as the coordinator of all workforce development activities in the community.*

2. *Administrative Planning* is concerned with the procedures for controlling the program; e.g., fiscal, MIS, contracting. A goal of administrative planning may be:

*To develop procedures which assure that funds are properly accounted for and spent in a manner which is consistent with the Act and promotes the overall purpose of the program.*

3. *Strategic Planning* is the process for deciding, with a longer term view, what to do: target group(s) the program will serve; outcomes the program will attain; and, set(s) of services the program will offer. Strategic planning functions may include research, analysis and the development of decision options. Results (outputs) of strategic planning are used as the foundation for operational planning decisions.
4. The process of *Operational Planning* translates the decisions concerning what will be done, into specific action steps.

The Local Job Training System illustrated on page 18 presents some of the components of operational planning and shows their relationship to other processes and functions operating within the local job training system. Note that responsible outreach and recruitment decisions are based on many other earlier decisions which include targeting, outcomes, service design, service deliverers and performance standards.

## SYSTEM PLANNING

5. **Written Plans** for marketing and local job training service delivery can help to clarify the systems, activities, and costs associated with developing and delivering desired services. There are many benefits to developing written plans. Written plans can:

- *Encourage the integration of an organization's mission and vision with strategic planning strategies and program objectives.*
- *Assist everyone involved (PIC members, staff, contractors, and others) in providing a clear and consistent message about the program to customers.*
- *Establish goals and standards as benchmarks for evaluation and system improvement.*



## ► METHODS AND TECHNIQUES FOR SYSTEM PLANNING

The planning process has a number of functions where the sequence of decisions will make an impact on the ability of a local Service Delivery Area to target those who should be served. Important strategic planning functions include *targeting*, *outcomes goals*, and *service design*. For example, an SDA which plans its service design before it determines who will be served clearly has to work with the output of the service design process as an input to the targeting process. Likewise, should the Input ► Process ► Output function related to targeting precede service design, the output of targeting must be dealt with as an input to the process of determining the best and most appropriate service design.

This section, Methods and Techniques, is designed to suggest a Classical Model planning decision sequence: *Targeting ► Outcomes ► Service Design*. This is the pattern that the JTPA Amendments anticipate SDAs will follow in planning local programs. This model is further discussed within the context of four other planning sequences, which SDAs throughout the country are currently using. Our objective in presenting this information is to convince SDAs that:

*To be responsive to the mandates of the JTPA Amendments to serve those who are most-in-need, targeting should be considered first in the planning sequence.*

### CLASSICAL MODEL PLANNING SEQUENCE

**TARGETING ► OUTCOMES ► SERVICE DESIGN**

#### TARGETING

First and foremost, the Act serves as a model for planning through its very structure which targets first to those who will be served through its designation of specified eligible groups under each title. Title II is targeted to disadvantaged individuals and older workers and, through the Amendments, it is further targeted to the hardest to serve. Title III is restricted to eligible dislocated workers, and Title IV is subdivided into programs for target groups such as Native Americans, migrant and seasonal farmworkers, and veterans.

The JTPA Amendments were the culmination of a long process that examined, among other things, whether JTPA was meeting the requirement (Section 141(a)) that training be provided to those who can



benefit from, and who are most-in-need of such opportunities. The imposition of the new requirement that 65 percent of all Title II participants meet defined hard-to-serve criteria was the result of this concern.

*The Law intends that targeting be the first decision in the program planning process.*

### OUTCOMES

Within the targeted structure of the Act, each title begins with a Statement of Purpose which sets forth the outcomes which are to be achieved through the programs authorized. Section 141(a) of the Act is clear that outcomes and targeting must be considered together. Targeting the most-in-need who have little chance of success, i.e., those who cannot benefit from training, would be a disservice to the individuals and the public. Alternatively, focusing too hard on outcomes, without regard to assuring service to those most-in-need can, and has, led to problems. One concern the Amendments address is the overemphasis being given to outcomes without assuring first that those being served are truly in need of training services.

*The Amendments are clear that targeting is expected to precede planning for outcomes.*

One of the hallmarks of JTPA has been that it is a performance-driven system accountable for outcomes. Section 106(b)(7)(B) clearly anticipates that outcomes in the form of performance standards will be established for targeted groups. The Governor is required to provide incentives for those SDAs which exceed the performance standards with respect to services to populations of hard-to-serve individuals.

### SERVICE DESIGN

It is clear throughout the Act that decisions about services must follow those related first to targeting and then to outcomes. The Statement of Purpose for each title is clear that programs are to be designed to accomplish specified outcomes. Additionally, the requirement that each Title II participant be provided an objective assessment and an individual service strategy (ISS) further reinforces the concept that the design of services must follow from who is enrolled and their planned goals or outcomes.

As noted in the Supplementary Information provided in the preamble to the JTPA Regulations, certain principles are central to the JTPA and the implementation of the Amendments. Among them are two:

- ▶ Training services should be of the highest quality and responsive to the needs of the individual participants and the labor market; and,
- ▶ Performance standards will be based on program outcomes, and they will be set to encourage interventions, program strategies, and arrangements that provide appropriate services, enhance opportunities for long-term livable-wage employment, and increase participant earnings potential.

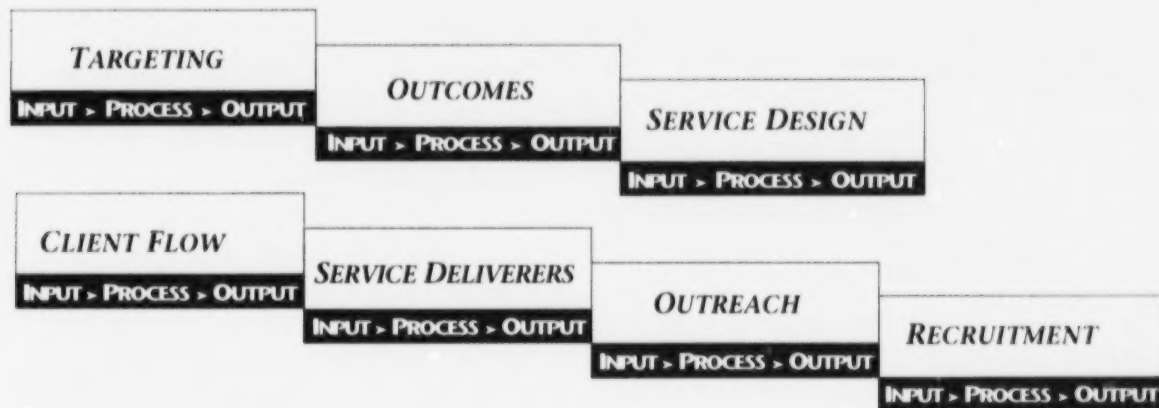
## SYSTEM PLANNING

Each of the principles reinforces the planning notion that:

*Services must not dictate, but rather be supportive of, decisions related to who to serve (targeting) and for what purpose (outcomes).*

### CLASSICAL MODEL PLANNING SEQUENCE

**TARGETING ► OUTCOMES ► SERVICE DESIGN**

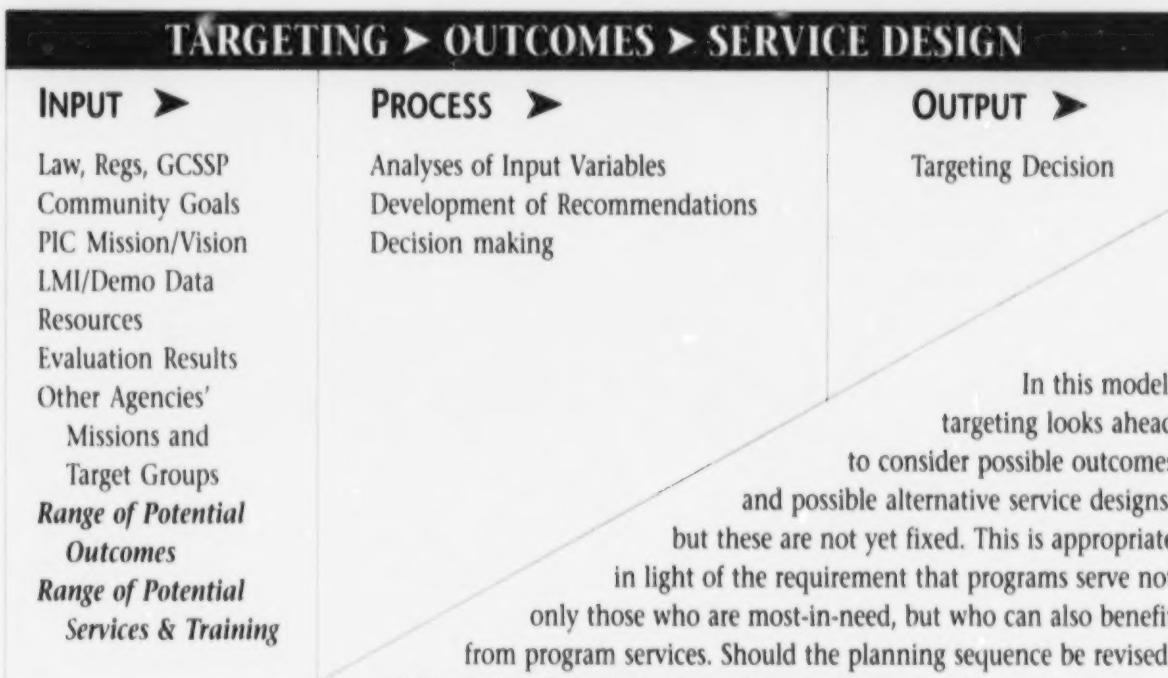


In this strategic planning sequence, the targeting decision comes first and would be unconstrained by output from other planning decisions. As a result, the SDA would be in the best position to make targeting decisions which best serve the needs of the population, the community and employers. Planning decisions for outreach and recruitment are operational in nature and follow the strategic planning process as well as key planning decisions related to client flow and selection of service deliverers.

There are many inputs to the "targeting first" model. These include: the Act and Regulations, community goals, PIC mission and vision, evaluation results, other agencies' missions and target groups, a range of potential outcomes, and a range of potential services and training.

## SYSTEM PLANNING

In many communities, JTPA programs operate as one part of a larger workforce development strategy. In these cases, there may be community planning outputs which must be considered as input in each step of the JTPA planning process. These larger system planning processes could deal with any number of key issues including workforce goals, public assistance, educational goals, and economic development. The Input ► Process ► Output planning sequence for the targeting subsystem is presented as follows:



In this model, targeting looks ahead to consider possible outcomes and possible alternative service designs, but these are not yet fixed. This is appropriate in light of the requirement that programs serve not only those who are most-in-need, but who can also benefit from program services. Should the planning sequence be revised, with targeting following other subsystem decisions, the potential service mix and/or desired outcomes will change character and become finally determined. This type of new input will have significant impact on the targeting process as discussed in the alternative planning sequences.

Following are four alternative planning sequences which SDAs have told us they are using to make their targeting decisions. Our objective in presenting these examples is to show you their constraints and reinforce the notion that targeting should be the first consideration in the strategic program planning process.

## ***ALTERNATIVE PLANNING SEQUENCES***

As we mentioned earlier, responses to our questionnaires revealed that SDAs across the country are using a variety of planning sequences, not always with targeting as the first step considered. We offer them here... along with constraints, with the hope of convincing SDAs that the Classical Model Planning Sequence previously described is ideal for ensuring program success.

### ***ALTERNATIVE # 1***

**TARGETING** ► **SERVICE DESIGN** ► **OUTCOMES**

### ***ALTERNATIVE # 2***

**SERVICE DESIGN** ► **TARGETING** ► **OUTCOMES**

### ***ALTERNATIVE # 3***

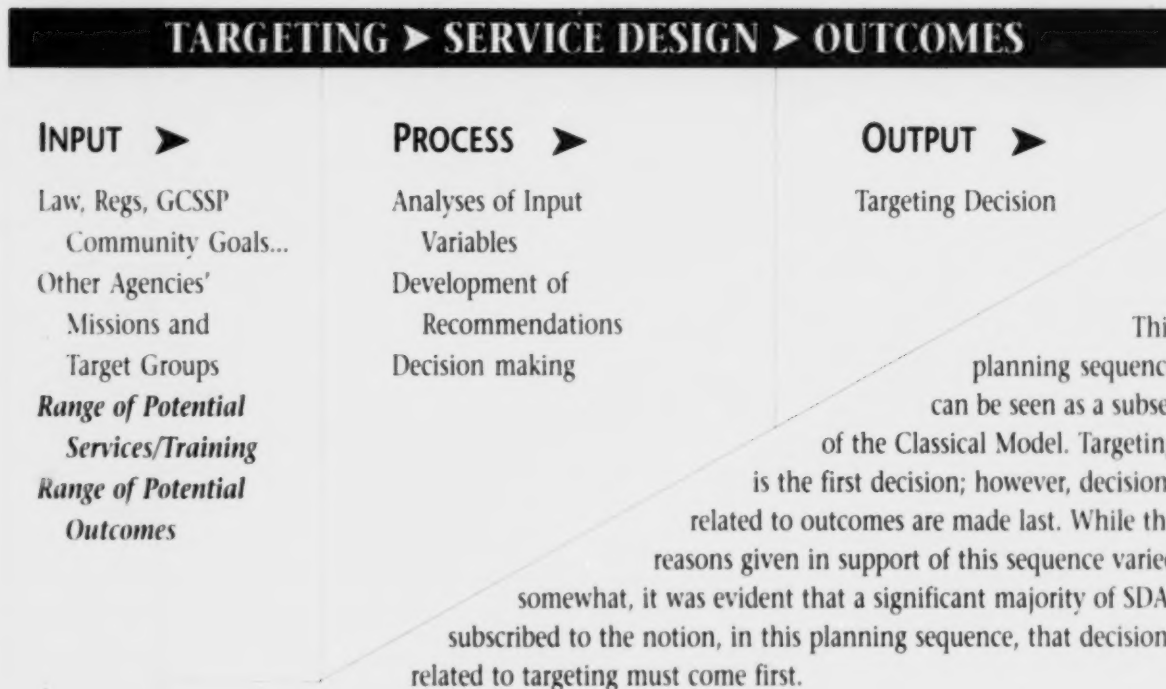
**OUTCOMES** ► **SERVICE DESIGN** ► **TARGETING**

### ***ALTERNATIVE # 4***

**PERFORMANCE STANDARDS** ► **TARGETING** ► **SERVICE DESIGN**

## SYSTEM PLANNING

### #1 **TARGETING ► SERVICE DESIGN ► OUTCOMES PLANNING SEQUENCE**



The view of those using this approach is in concert with the approach taken through the Act that decisions related to people to be served should take precedence over other considerations on the services and outcomes. Program design and capacity should be driven by the needs of the target population and not the other way around, and meeting the needs of the participants is the first and foremost objective in the TOR process.



## SYSTEM PLANNING

Many of the responses we received from SDAs revealed that Targeting ► Service Design ► Outcomes was the planning sequence they used. They found this sequence to be most successful for their program. Here are some of the reasons they gave for why it made sense:

*"Targeted groups define the types and kinds of services to be developed and made available to clients."*

*"Targeting, services, outcomes is an approach that identifies the people to be served with barriers to employment and then develops the services to overcome the barriers."*

*"Since there are insufficient funds to serve all eligible people, the SDAs must target and then determine the services needed and available."*

*"Targeting, services, outcomes meets the needs of local communities and addresses a national interest linked to the economy."*

*"The program design is tailored to the targeted participant needs. Services and outcomes will be determined by these needs."*

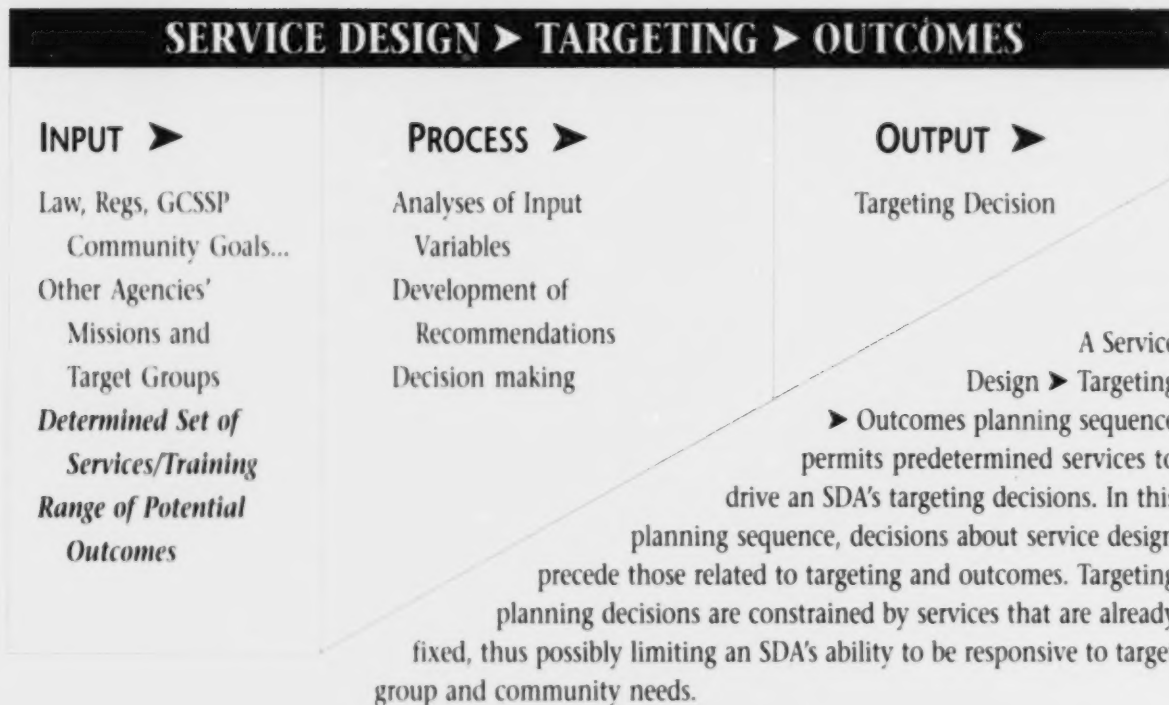
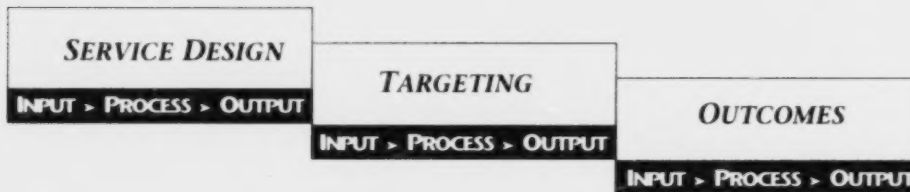
The responses also indicated strong acknowledgment for the notion that the output of targeting will become input for planning the service design and the outcomes. It was noted that the results of the targeting process will necessarily alter the service mix and the outcomes that can be expected.

Targeting ► Service Design ► Outcomes works for SDAs because it allows them the freedom to make targeting decisions without concern for prior restricting commitments on matters of service design or expected outcomes. In this sequence, the needs of the population receive first consideration. At this stage, information on service design and outcomes are confined to analysis of their potential range and mix.

Inasmuch as this Targeting ► Service Design ► Outcomes planning sequence is viewed quite favorably, it does pose constraints to SDAs using it. In program operations and delivery, a Targeting ► Service Design ► Outcomes sequence makes the most sense as we select hard-to-serve, provide appropriate services and get results. It makes less sense from a planning perspective. For example, decisions relating to service design precede those for outcomes. The effect of this order reversal is that there is less opportunity to be responsive to Section 141(a) of the Act which requires that the most-in-need must also be able to benefit from program services.

The amended Act places greater emphasis on outcomes for programs as well as targeted participants. *SDAs which determine service design before establishing outcomes risk providing services which are not fully responsive to the achievement needs of the targeted population and program goals.* Reordering the sequence with outcomes considered before services is recommended in light of the requirement that *programs serve not only those who are most-in-need, but also who can benefit from program services.*

## #2 SERVICE DESIGN ► TARGETING ► OUTCOMES PLANNING SEQUENCE



Over 20 percent of the responses received from SDAs indicated that Service Design ► Targeting ► Outcomes impacted them in one way or another. Most noted that this was the planning strategy that they were comfortable with. A few asserted that it is the way they do business but not the way it should be done.

Responses which favored this planning sequence varied; although the recurring explanation given for focusing on services before targeting was the need to "fill existing training courses/slots." Other respondents reported that they focused on services first because they were "better able to place clients in already existing programs at little or no additional cost." Another rationale given was that "fitting people

## SYSTEM PLANNING

to existing services" enhanced performance outcomes especially for areas that may not have the resources or networks to tap into or to develop new training courses.

This Service Design ► Targeting ► Outcomes planning sequence might be feasible for small rural SDAs with a limited set of services, SDAs with insufficient funds to develop new training/services and, in some cases, for SDAs developing a new program to demonstrate the best set of services/service mix.

Generally, a concern about filling existing slots is an operational planning concern. *SDAs need to do strategic planning first and not let operational issues totally drive long-term thinking.*

Although this approach was viewed quite favorably by over one-fifth of those who responded, it does pose some constraints on SDAs using it. Examples of some constraints follow, along with considerations for SDAs operating under this planning sequence:

- **CONSTRAINT:** *The services which are fixed and in place may be inadequate to meet the needs of the potential target groups. As a result a most-in-need group may not be targeted.*

CONSIDERATION: The Service Design ► Targeting ► Outcomes sequence suggests that service design decisions precede decisions about the people who are to be targeted and enrolled and what they might need in the way of services to benefit from the program. Such a strategy may not be responsive to target group and individual needs and barriers which are often not identified until after the client is assessed. For example, if you take what is given, you will never stretch to develop new services to serve your most-in-need population. An SDA should research and examine all of the JTPA and non-JTPA services that could possibly be created or made available within their local labor market area prior to making their targeting decisions. All information which will enhance planning decisions should be considered. However, decisions about who should be served should be considered first, before all others.

- **CONSTRAINT:** *The services selected may not be appropriate for the outcomes chosen.*

CONSIDERATION: The Classical Model, Targeting ► Outcomes ► Service Design advocates considering who you intend to serve and what you are trying to accomplish first and then designing a service mix responsive to your target group(s) and outcome(s). SDAs should be doing this planning up front, especially those SDAs in a contracting mode. Request for Proposals to contractors should be based on decisions about who is to be targeted and what is to be accomplished to get the best, most responsive mix of services.

- **CONSTRAINT:** *The service design may be too expensive.*

CONSIDERATION: Services can be over or underbuilt. Services which are not tailored enough to target group needs and outcomes could waste SDA resources. Again, targeting and outcome decisions — what you are trying to accomplish — must be given first and foremost consideration.

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► **CONSTRAINT: *Services may not appeal to target groups.***

CONSIDERATION: This could be a variation of what target groups/individuals need and what they perceive they need or want. A mismatch might disrupt an SDA's recruitment since those targeted may not be offered what they view as beneficial services.

► **CONSTRAINT: *The services offered may be geographically inadequate.***

CONSIDERATION: This coincides with not meeting the needs of target groups and inconvenience. If services aren't convenient, people won't use them. Targeting considerations should include the location of most-in-need groups and available training and service organizations.

► **CONSTRAINT: *Unless coordinated with other agencies, services might be duplicative.***

CONSIDERATION: An SDA must know what non-JTPA services are available within their local labor market area (or even external to that labor market if two or more SDAs are co-contracting) in addition to which agencies they share common target groups with. Again, this speaks to considering "who you are serving" before designing or selecting services.

Coordinating with other non-JTPA agencies might also provide greater flexibility in using funds, the ability to offer a wider range of services, better performance outcomes and cost savings through the elimination of duplication. SDAs must think strategically, not operationally, to put targeting in its proper place.



## #3 OUTCOMES ► SERVICE DESIGN ► TARGETING PLANNING SEQUENCE



Fifteen percent of the responses received from SDAs indicated that outcomes were the driving force behind their targeting decisions. In this scenario Services/Training and Outcomes are already determined and might be defined as "set expectations" such as job placement, training or special services for JTPA participants, and any other identified goals for the local labor market area.





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The following are statements from SDAs whose responses favored this planning sequence:

*"Targeting cannot be considered without recognizing the performance implications of the targeting decisions."*

*"Outcomes planned for various programs drive the targeting of the people."*

*"You must determine the kinds of outcomes you want, only then can you determine how to accomplish outreach and recruitment."*

*"Programs must be developed to meet the needs of local employers."*

*"If outcomes are not being met then additional targeting, outreach, and recruitment will be needed in those areas."*

*"JTPA is a performance driven program."*

This planning sequence looks to be the most feasible to those who view outcomes as the central focus of their targeting planning decisions. The PIC knows what objectives (outcomes) it wants the program to achieve in the local SDA, and such objectives give the organization a clear sense of direction and purpose.

The Outcomes ► Service Design ► Targeting sequence has several constraints:

- **CONSTRAINT:** *An outcomes focus may drive toward "creaming"; directing targeting efforts toward those who can achieve the desired outcome and not necessarily those who are most-in-need and can benefit.*

CONSIDERATION: This indicates a primary focus on attaining outcomes which may not be closely aligned with target group barriers and needs. If nothing else, this planning sequence gives the appearance that creaming may result. Outcomes and targeting must be considered in tandem to be responsive to Section 141(a) of the Act which requires that opportunities be provided to those who are most-in-need and who can benefit.

- **CONSTRAINT:** *Defining outcomes and services before determining who to serve might restrict the services that are responsive to the outcome(s) by altering the mix to assure that outcomes are met.*

CONSIDERATION: Establishing the service mix to respond to a set of chosen outcomes is appropriate. However, making these decisions prior to selection of target groups gives the clear indication that performance is paramount, regardless of target group needs. In fact, there is some chance that real planning for target groups may never take place and that operators will merely be told to find eligible hard-to-serve people to fill the slots that have been created. SDAs using

## **S Y S T E M   P L A N N I N G**

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this sequence may wish to enhance their planned service design mix with increased flexibility, customization, and individual referral arrangements in order to be more responsive to target group needs as they are realized.

- **CONSTRAINT:** *A determined set of outcomes and services greatly narrows potential target groups that may be addressed.*

CONSIDERATION: Many potential target groups may be eliminated from consideration under this scenario due to the potential mismatch between the outcomes and services selected and the needs of those finally selected. The Act intends that services be responsive to the needs of participants and this sequence should begin during the planning process. The planning process should hold final decisions about outcomes and services in abeyance until it is determined who will be served. An SDA using this planning process might include a feedback loop after the targeting decision to test whether decisions on outcomes and services still make sense and are appropriate to the needs of the targeted groups.

- **CONSTRAINT:** *Outcomes chosen may not be realistic for those later selected.*

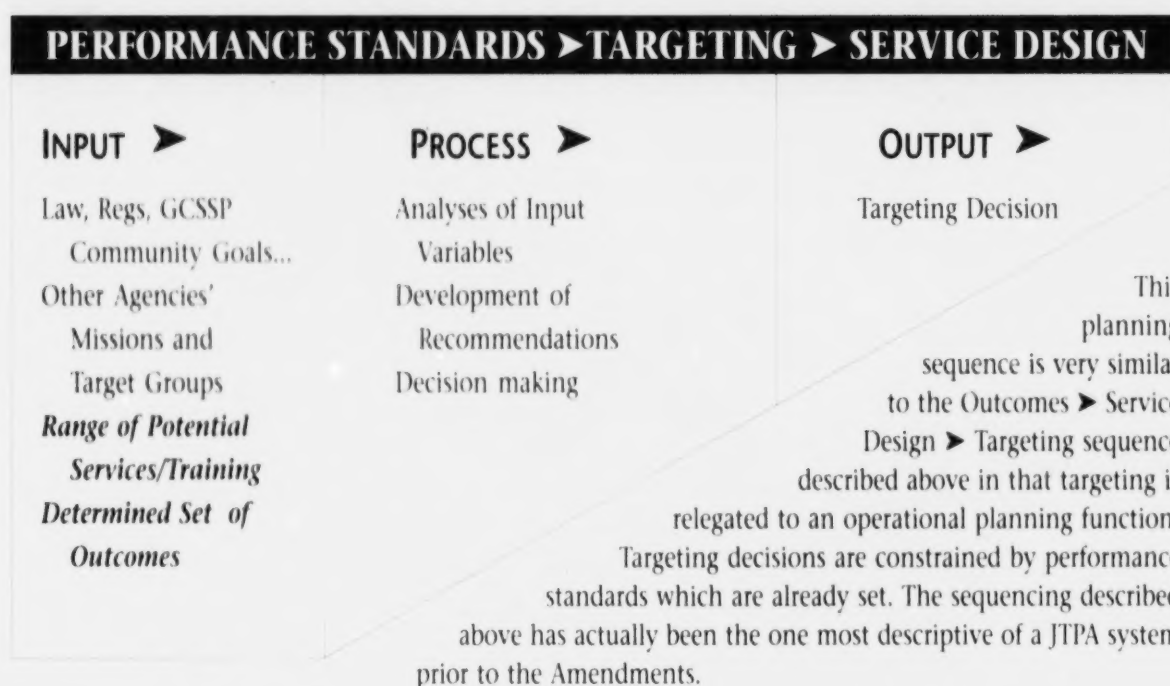
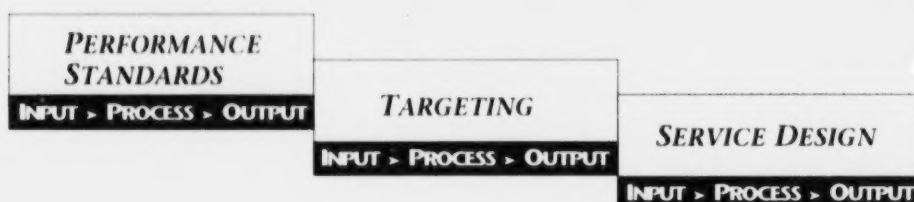
CONSIDERATION: Feedback loops from the assessment process could help to assure that future outcomes planning is realistic to the needs of the target groups being served.

- **CONSTRAINT:** *This sequence operates in response to a finite set of services available in the community which have been operating the program for years.*

CONSIDERATION: SDAs that find themselves in this situation, due to long-standing commitments and relationships, may wish to develop a long-range incremental approach to converting to a system where targeting comes first. As old relationships expire or new funding becomes available, efforts might be made to focus new projects first on who to serve. Uncommitted funds might be used to create new training or services beyond what currently exists. New partnership arrangements might be explored for cost sharing. *Remember, targeting is a strategic planning process, not an operational process related to intake and enrollment.*

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### **#4 PERFORMANCE STANDARDS ► TARGETING ► SERVICE DESIGN PLANNING SEQUENCE**



Approximately ten percent of the respondents indicated they felt that the performance standards affect targeting decisions and that they, in fact, drive the TOR system. Typical statements included:

*"JTPA is performance driven."*

*"TOR is driven by performance standards."*

*"TOR must complement the program to meet the performance standards."*

*"We target, outreach and recruit to meet the performance standards."*

*"We are forced to limit those we can serve to those who will meet the performance standards."*

One response indicated that the most-in-need and hard-to-serve should be served but this must be evaluated and counter-balanced by the need to meet the performance standards and to project a favorable image for employers. Another response stated that each SDA was unique and that the target populations vary according to specific performance measures.

Regarding why SDAs should target, several respondents again cited the performance standards. One cited making better efforts to ensure the program's impact on long-term results. Another SDA commented that they target those that benefit their standards. Another cited their need to meet their planned level of service to the demographic groups and that they were penalized by not getting their six percent funds if the SDA failed its standards. Others cited the performance standards as factors to consider, along with funding levels and state goals.

There also seems to be a persistence of belief among SDAs throughout the country that once the performance standards are established by the State, the SDA is constrained to exceed those standards. And, for this reason, the targeting decisions are made to fit the expected outcomes to achieve the performance standards. If an SDA treats the performance standards as a given, then it must react by attempting to design its targeting and service strategy to attain those standards. The expectations set by the performance standards become the prime consideration for receiving incentive grants (and possibly other recognition) and avoiding sanctions.

Unlike PIC goals or SDA Director management objectives, which are internally imposed on the SDA, the performance standards are external impositions from the State and DOL. The premise is that the SDA has little or no influence on affecting those standards.

Performance standards are an operational planning function that should not drive strategic planning decisions. *Targeting decisions which are constrained by performance standards (outcomes) that are already set greatly limit an SDA's ability to be responsive to target group needs.*

Here are some constraints and considerations for why SDAs might want to make adjustments:

► **CONSTRAINT:** *A Performance Standards ► Targeting ► Service Design sequence might restrict the services provided by altering the mix to assure performance success. It also restricts the targeting to those groups which are most likely to assure success. The premise here is that the performance standards make it easier to achieve success with some client groups than with others. The emphasis is on organizational success, and not necessarily participant success. Strict adherence to this approach may result in "creaming" — serving those who are most likely not to be the most-in-need of JTPA.*

CONSIDERATION: This indicates a principal focus on achieving or exceeding the performance standard(s) which may not be closely aligned with target group needs. To overcome this, the SDA



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need only be aware that, for the DOL performance standards, if the SDA's State is using the DOL model, the model will automatically adjust for those factors affecting that performance measure. The Department of Labor's adjustment models for the national performance standards departure points are designed to "level the playing field" by factoring in a degree of difficulty in achieving success based on the groups selected. When a target group is selected to be served and it is not a designated factor for a given measure, the SDA can use the Worksheet for Adjustments Beyond the Model to determine the weighted impact of the selection of that target group on the measure. *The key consideration here is that your targeting decisions will not only impact your expected performance, but will also impact your planned performance standards.*

***Do not let the numbers drive your targeting decisions; let your targeting decisions determine your numbers!***

An SDA's inclination to use this approach is somewhat influenced by the degree of confidence manifested by the PIC and SDA Director that their TOR decisions will impact on their performance standards instead of vice versa. If the PIC or SDA Director allow the determination of the anticipated outcomes to dictate who is to be targeted, then the SDA has allowed the cart to pull the horse.

- ***CONSTRAINT: SDA options are further constrained by leeway afforded by the policies of the SDA's State. If State policies do not allow for Governor's adjustments, then a significant incentive for targeting truly hard-to-serve clients is missing.***

CONSIDERATION: Section 106 (d)(1) clearly states that each Governor **shall** prescribe and report in the GCSSP variations in performance standards based upon specific economic, geographic, and demographic factors in the State and in SDAs in the State. Thus while the Amendments **require** some adjustment policy, there still remains a large variation among the states regarding the extent of the adjustments permitted, and a large inconsistency with regard to how the adjustments will be triggered.

The SDA should not be shy to request a Governor's adjustment. The state of the local economy, the erosion of the local employer base, the lack of opportunity for worker skill training, and the inherent uncertainty of reaching out to those in the community who really need a sustained second-chance training program may adversely affect the performance of the SDA. If these external factors are at play, it is the responsibility of the SDA to bring them to the awareness of the State, and it is the SDA's responsibility to formally request an adjustment based on the circumstances.

- ***CONSTRAINT: This planning sequence lets operational results drive strategic planning decisions.***

CONSIDERATION: Performance standards are an operational planning function that should not drive strategic planning decisions. Making targeting and service design decisions in response to



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operational results gives the indication that performance is paramount, regardless of target group needs. In fact, many potential target groups may be eliminated from consideration if operators are directed to find eligible hard-to-serve people to fill the slots that have been created to assure that performance outcomes are met.

- **CONSTRAINT:** *This sequence operates in response to outcomes that are viewed too narrowly (six standards) and limited.*

**CONSIDERATION:** SDAs using this sequence might also want to consider other outcomes besides the six standards such as "reduce dropouts," "reduce welfare," "improve school-to-work transition," "meet employer skill shortage needs," and "increase skill competencies." The object is to move beyond performance standards in setting outcomes, but hold final decisions on them until targeting decisions are made.

## ***FITTING OUTREACH AND RECRUITMENT INTO THE PLANNING SEQUENCE***

Although we have treated Targeting, Outreach, and Recruitment throughout the chapter as a single concept, they are three separate functions, with targeting being primarily a strategic planning function and outreach and recruitment being much more operational in nature. Accordingly, *the outputs of targeting decisions contribute significantly to outreach and recruitment goals and priorities.*

Outreach and recruitment are the first functions in the program operations process. They articulate and convey the PIC's mission, values, and vision to the various audiences and individuals who are viewed as "customers"; those you want to work with and those you want to sign up for your programs.

Planning for outreach and recruitment occurs as part of the operational planning process.

Many PICs have found that the most valuable tool in designing their outreach and recruitment strategy is a written Marketing Plan that details their outreach and recruitment activities. The Marketing Plan can be the "common plan" which flows from the PIC's mission, vision, strategic planning strategies, and program objectives.

A written Marketing Plan can also help to:

- Develop clear and concise goals and objectives for your outreach and recruitment program
- Encourage organized thinking around achieving your goals and objectives
- Encourage the integration of targeting, outreach and recruitment activities to maximize results and gain cost savings
- Develop a systematic plan for implementation
- Evaluate the success of your outreach and recruitment efforts

There are many options to consider in developing outreach and recruitment strategies and a Marketing Plan responsive to your organization's targeting and program needs, many of which will be addressed in subsequent chapters of this Guide.



## ► **MANAGING THE SYSTEM PLANNING FUNCTION**

This chapter has supplied a significant amount of information about system planning and the important role TOR plays in planning and program operations.

Unquestionably, system planning is something that PICs will need to be doing, and it ought to include much of what was discussed above. It should be ongoing, interconnected, flexible, and address competing circumstances and constraints.

Likewise, system planning is most productive when it is preceded by PIC leadership through the creation of mission, values, vision, and made up of the elements discussed — strategic planning strategies and program objectives.

Leadership is creating a vision and turning it into action through planning. PICs are in a leadership position to develop the vision for their community and workforce from which operating strategies and goals can be achieved. They must assess their options on who they can or should serve, what their training capabilities are and what outcomes they might wish, or be required, to attain.

The following is an example of the leadership displayed by a particular Private Industry Council, The Seattle-King County PIC, in reworking its vision and operating strategies to be more responsive to the worker preparation requirements of the local Puget Sound area.



**IDEA...**

**ON PIC LEADERSHIP  
IN DEVELOPING A  
VISION AND  
RESPONSIVE  
STRATEGIES**

The Seattle-King County Private Industry Council, for the 1990-91 biennium, instituted the most sweeping changes in its employment and training programs since the inception of the Job Training Partnership Act.



Seattle - King County PIC  
Market Place One, Suite 250  
2001 Western Avenue  
Seattle, WA 98121  
(206) 684-7390

Seattle and King County are like many other large metropolitan communities across the country that are experiencing labor shortages. With a 4.5 percent unemployment rate, the training and social service needs of individuals seeking services were significantly different than those served in previous years. At the same time, local employers were telling the PIC that there was a growing shortage of skilled job applicants.

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As a result of this changing climate, the PIC instituted a process to develop and implement a new strategy to address the needs of adult and youth participants.

This strategy emphasized four major program issues:

- ▶ Emphasizing services to hard-to-serve job seekers
- ▶ Emphasizing job placement, competency attainment and long term employability as desired outcomes
- ▶ Matching training services to the needs of participants
- ▶ Providing basic skills remediation when needed

This new strategy also defined employability in terms of three skill areas:

- ▶ Life Skills (managing one's life)
- ▶ Basic Skills (reading, writing, computing)
- ▶ Job Skills (vocational specific skills such as word processing and metal fabricating)

In the past, the Seattle-King PIC focused primarily on serving participants based on their characteristics (welfare recipients, high school drop outs, handicapped). The PIC has continued to set enrollment objectives for these groups with direct services to those who are most deficient in life skills, basic skills and job skills.

A key feature of their new approach is to provide a menu of services matched to the needs of participants as opposed to fitting participants into predetermined training "slots." The menu provides an array of services in the three skill areas. Ideally, all training offered is *competency based*. That is, individuals should be able to demonstrate mastery of a skill at the completion of training.

As an example, a severely skill deficient, hard-to-serve participant may need and receive basic skills training along with classroom occupational skills training followed by on-the-job training (OJT) while a less skill deficient participant might only need and receive OJT.

In the past, the Seattle-King PIC encouraged program designs that included basic skills training options. This new approach, however, mandates the provision of basic skill training to those who are assessed as deficient in reading and/or math on a standardized appraisal instrument selected by the PIC. Basic skills must be integrated into the training plan so that there is a logical connection to employment.

Again, the emphasis of this program strategy is to target and serve participants who are most deficient in basic skills and to provide training services that can bring an individual's basic skills up to a level at which they will be marketable.

What does the PIC expect from this new system design? Quality outcomes for those with barriers. In previous bienniums, the PIC focused on placement outcomes and cost as key factors in evaluating planning and program quality. For this new system, the PIC has redefined quality outcomes in terms of who is



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targeted and who gets served (i.e., skills deficient job seekers) and long-term employment measured at 13 weeks following termination from the program. A quality program serves the most skills deficient of JTPA-eligible participants, provides a menu of services matched to individual participant needs, and results in confirmed employment measured at 13 weeks following termination (for adults). For youth, quality is defined as service to harder to serve, skill deficient youth, the acquisition of employment enhancements and confirmed pre-determined quality outcomes measured at 13 weeks following program termination.

This new approach has impacted the local Seattle and King County human service delivery system by placing more demands on limited resources while at the same time eliminating JTPA-funded quick turn-around job placement services. This has required adjustments in the local service delivery system.

The PIC, in implementing this system, has also had to confront numerous challenges in developing internal systems to plan, manage, and evaluate the new program design as well as provide technical assistance to contractors in major aspects of the new approach.

Other strategies have included:

- ▶ Redefining the PIC's role in the coordination of human services and the development of non-JTPA resources
- ▶ Redefining the role of the private sector in the PIC's programs
- ▶ Developing and implementing a thorough evaluation of the system
- ▶ Engaging in other program development and technical assistance activities to ensure the delivery of quality services to those who are most-in-need and can benefit

Since 1990, the Seattle-King County region has experienced a sharp increase in unemployment. The PIC remains committed to the principles of its redesign and sees an even greater need for comprehensive training to prepare skill deficient job seekers for a more competitive labor market.



## **SIX QUESTIONS TO EFFECTIVE SYSTEM PLANNING**

One of the most helpful ways to assess your planning needs is to set aside a block of time for PIC members and staff to review and discuss your organization's current "planning reality." Here are some questions to help you get started:

**Question 1** Where in our process are TOR functions planned?

When are decisions on targeting made? What are the inputs to our targeting process? Which decisions related to service design or outcomes are already determined? Which are open? When are plans for outreach and recruitment developed?

**Question 2** If targeting does not precede other planning decisions, what flexibility does our planning process have to assure that the needs of targeted groups can be met?

**Question 3** When can our PIC/SDA re-examine prior decisions related to service design or outcomes?

What are the feedback loops for reconsidering prior decisions based on the output of processes downstream? What options built into decisions on service design or outcomes allow tailoring based on subsequent target groups decisions? How can feasibility testing be made a routine part of our planning process?

**Question 4** If services in our SDA are very limited and perceived to be unchangeable, what plans might we have to move to a system that is more responsive to target group needs?

Has our PIC adopted an approach that does not automatically accept what currently exists? What are the alternatives for creating new sets of services? Who is exploring/developing new sets of services? How can we change incrementally to a targeted system as new funds become available? How can joint agreements be developed with other agencies who share the same target group needs?

**Question 5** What are other agencies' mission/goals? What ways might we include consideration of the mission and goals of other agencies which also serve the targeted groups?

**Question 6** In what ways does our PIC/SDA planning process articulate our mission and vision?

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At first glance, the above considerations might seem a bit overwhelming and unreasonable, especially in the face of dwindling resources. Don't think that you have to "re-invent the wheel" overnight. Small incremental changes can create the foundation for system-wide reform.

Start out by assessing your organization's system-wide planning needs and building support for planning decisions which fulfill the mission and vision of your organization. Coalition building, involving all key players from both the formal and informal authority structures within your organization, is one way to gain support.

Remember that line staff play a critical role in translating the plan into quality service delivery. Be ready to provide staff with the information and technical skills necessary to meet the new expectations. Internal staff meetings and in-service training are simple but effective methods to help build support and keep staff informed and involved.

Also remember to design your system planning approach to include staffing and timing requirements, an evaluation strategy that provides continuous feedback on how well you are meeting your objectives, and recognition of staff, contractors and others when objectives are met.



## ► **TRANSITION TO TARGETING**

There are many options to consider in doing system planning. In this chapter, we offered our thoughts on what system planning is, how it affects local program planning and operations and, more specifically, how it relates to targeting, outreach, and recruitment.

Taking the time to plan makes good sense, for it can help you discern the implications of the alternatives and decide what works best within a local context. This chapter concludes with reference material on Working Examples and relevant citations from the Act and regulations. The next chapter on Targeting addresses the importance of this activity and how, if done well, it can improve your decisions about who is most-in-need of and can benefit from your services.



## **WORKING EXAMPLES OF SYSTEM PLANNING**

Because we have emphasized the need for SDAs to have a clear mission and/or vision to guide their program and the myriad of decisions they make throughout the year, on the following pages we offer you numerous examples of mission and vision statements which reflect the thrust of the Amendments — Targeting ► Outcomes ► Service Design. These statements represent hours of valuable discussion, debate and decision, all of which are beneficial to PIC and SDA staff members.

We encourage you to browse through these mission/vision statements as you either begin to develop your own or reassess your current statement. Of course, you are welcome to borrow from these statements to add to your own!



## **MISSION AND VISION STATEMENTS**

### **LA COUNTY PRIVATE INDUSTRY COUNCIL SERVICE DELIVERY AREA, LOS ANGELES, CALIFORNIA:**

To help unemployed county residents achieve economic self-sufficiency by providing job training and the necessary supportive services which will result in long-term employment.

### **THE PRIVATE INDUSTRY COUNCIL OF PHILADELPHIA, INC., PHILADELPHIA, PENNSYLVANIA:**

The mission of the Private Industry Council of Philadelphia is to serve as the primary training-based bridge connecting Philadelphia's unemployed, at-risk youth, and adult and dislocated worker populations with area employers. In response to the diverse needs of the populations served, PIC offers programs designed to prepare clients for economic self-sufficiency. These programs include basic education, work preparation, occupational skills training, employment counseling, support services, and individual case management.

### **SOUTHWESTERN WISCONSIN PRIVATE INDUSTRY COUNCIL, INC., DODGEVILLE, WISCONSIN:**

To close the gap between the skill needs of employers and the skill attainment of workers; to ensure, through the strengthening of partnerships, to promote awareness among businesses and citizens of the need for life long learning in order to prepare for changing occupations; to promote economic self-sufficiency and to ensure the most effective use of resources.

### **BROWARD EMPLOYMENT AND TRAINING ADMINISTRATION, FT. LAUDERDALE, FLORIDA:**

The BETA Industry Council's mission is to improve the skills and economic opportunities of Broward County residents who have significant barriers to gainful employment. To accomplish this end, the PIC will:

a) Develop broad program policies and goals; b) promote partnerships between BETA and area businesses, community-based organizations, educational institutions, social service, labor organizations, and other related agencies; c) encourage program innovation to improve the quality of services to participants and employers; and d) provide oversight on the selection of service providers and evaluation of program effectiveness.





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### **THE OREGON CONSORTIUM AND THE OREGON PRIVATE INDUSTRY COUNCIL, INC., ALBANY, OREGON:**

A Partnership dedicated to the development of a world-class workforce in Rural Oregon.

Provide quality, cost effective assessment, supportive services, skills training and placement to low income, low skilled, and dislocated workers; establish a comprehensive TOC-wide service delivery system encompassing JTPA, jobs and state dislocated worker programs; participate actively in the ten Regional Workforce Quality Committees in the SDA; incorporate relevant Oregon Benchmarks in planning; meet or exceed all state and federal performance standards; support a model skills center in each TOC district; strengthen our investment in the organizational development of the PIC, Board, District Staff, and TOC Administrative Office.

### **SIX COUNTY CONSORTIUM FOR EMPLOYMENT AND TRAINING, ESCANABA, MICHIGAN:**

Promote employability enhancement throughout the Central Upper Peninsula utilizing Consortium and Community Resources to generate economic independence. To work with hard-to-serve populations (i.e., offenders, dropouts, dislocated workers, displaced homemakers, individual with lack of work history, chronic welfare recipients, and older workers) and to provide assessment of basic education and job skills, aptitude and interests, appropriate referrals to remedial education centers, personal plans of action, supportive services, work experience, classroom training, and on-the-job training to lead to unsubsidized employment.

### **THE PRIVATE INDUSTRY COUNCIL, PORTLAND, OREGON:**

To promote individual self-sufficiency and a skilled workforce by eliminating barriers to productive employment.

We believe that the following values and practices support the mission of the Private Industry Council:

Respect others' dignity, time and space

Listen actively

Take responsibility for your own opinions and actions

Communicate directly, honestly and constructively

Value differences

Help each person believe in his or her ability to make a difference

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### **PINELLAS COUNTY PRIVATE INDUSTRY COUNCIL, INC., CLEARWATER, FLORIDA:**

Through a public/private partnership, the mission of the council is to prepare unskilled adults and youth for long-term employment within the local community and to make initial job placement.

### **PALM BEACH COUNTY PIC, INC., PALM BEACH, FLORIDA:**

The provision of meaningful employment and training services to the JTPA population where they reside, so that they may obtain employment at a wage of self-sufficiency in close proximity to their residence.

### **LA COOPERATIVA, SACRAMENTO, CALIFORNIA:**

La Cooperativa is an association of organizations selected by the Department of Labor to provide employment and training services to the California Farm Worker Community. The Association's mission is to enhance the quality of life for California's migrant and seasonal farm workers.

### **BELLTOWN HOMELESS EMPLOYMENT PROJECT, SEATTLE, WASHINGTON:**

The Homeless Employment Project, a special project of the State of Washington Employment Security Department, is dedicated to providing work search assistance and employment support to the work ready adults among Seattle/King County's homeless population. Program services are designed to provide a most effective and rapid transition to obtaining and retaining permanent employment.

### **DULUTH PRIVATE INDUSTRY COUNCIL, DULUTH, MINNESOTA:**

It is our mission to be integral change agents in moving eligible individuals into long-term self-sufficiency through: information, resources and support. Inherent in this philosophy is knowledge and respect for the individuals and for the environment in which they wish to live and work.



## CITATIONS FOR SYSTEM PLANNING

### STATEMENT OF PURPOSE

Sec. 2. It is the purpose of this Act to establish programs to prepare youth and adults facing serious barriers to employment for participation in the labor force by providing job training and other services that will result in increased employment and earnings, increased educational and occupational skills, and decreased welfare dependency, thereby improving the quality of the work force and enhancing the productivity and competitiveness of the Nation.

### DEFINITIONS

Sec. 4. For the purposes of this Act, the following definitions apply:

(37) The term "participant" means an individual who has been determined to be eligible to participate in and who is receiving services (except post-termination services authorized under sections 204(c)(4) and 264(d)(5) and follow-up services authorized under section 253(d)) under a program authorized by this Act. Participation shall be deemed to commence on the first day, following determination of eligibility, on which the participant began receiving subsidized employment, training, or other services provided under this Act.

### JOB TRAINING PLAN

Sec. 104.(b) Each job training plan for the programs conducted under title II shall contain -

4) a description of linkages established with appropriate agencies, pursuant to sections 205 and 265, designed to enhance the provision of services and avoid duplication, including -

- (A) agreements with appropriate educational agencies;
- (B) arrangements with other education, training, and employment programs authorized by Federal law;
- (C) if appropriate, joint programs in which activities supported with assistance under this Act are coordinated with activities (such as service opportunities and youth corps programs) supported with assistance made available under the National and Community Service Act of 1990 (42 U.S.C. 12501 et seq.); and
- (D) efforts to ensure the effective delivery of services to participants in coordination with local welfare agencies and other local agencies, community-based organizations, volunteer groups, business and labor organizations, and other training, education, employment, and social service programs;

(5) goals and objectives for the programs, including -

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- (A) a description of the manner in which the program will contribute to the economic self-sufficiency of participants, and the productivity of the local area and the Nation; and
- (B) performance standards established in accordance with standards prescribed under section 106;

(6) procedures for identifying and selecting participants, including -

- (A) goals for the training and placement of hard-to-serve individuals, and a description of efforts to be undertaken to accomplish such goals;
- (B) outreach efforts to recruit and expand awareness of training and placement opportunities for such individuals; and
- (C) types of services to be provided to address the special needs of such individuals;

(7) (A) goals for -

- (i) the training of women in non-traditional employment; and
  - (ii) the training-related placement of women in non-traditional employment and apprenticeships; and
- (B) a description of efforts to be undertaken to accomplish the goals described in subparagraph (A), including efforts to increase awareness of such training and placement opportunities;

(9) a description of -

- (B) the process for providing information and referrals for applicants and participants relating to appropriate programs and service providers;
- (C) the services to be provided, including the means for involving labor organizations and community-based organizations in the provision of services, the estimated duration of service, and the estimated training cost per participant;
- (D) the competency levels to be achieved by participants as a result of program participation;

### **PERFORMANCE STANDARDS**

Sec. 106.(b) Title II Performance Standards. - (1) General Objective. - In prescribing performance standards for programs under parts A and C of title II, the Secretary shall ensure that States and service delivery areas will make efforts to increase services and positive outcomes for hard-to-serve individuals.

### **SELECTION OF SERVICE PROVIDERS**

Sec. 107.(b) Funds provided under this Act shall not be used to duplicate facilities or services available in the area (with or without reimbursement) from Federal, State, or local sources, unless it is demonstrated that alternative services or facilities would be more effective or more likely to achieve the service delivery area's performance goals.





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(d) The administrative entity shall not fund any occupational skills training program unless the level of skills provided in the program are in accordance with guidelines established by the private industry council.

### **GOVERNOR'S COORDINATION AND SPECIAL SERVICES PLAN**

Sec. 121.(b)(1) The plan shall establish criteria for coordinating activities under this Act (including Title III) with programs and services provided by State and local education and training agencies (including vocational education agencies), public assistance agencies, the employment service, rehabilitation agencies, programs for the homeless, postsecondary institutions, economic development agencies, and such other agencies as the Governor determines to have a direct interest in employment and training and human resource utilization within the State. Such criteria shall not affect local discretion concerning the selection of eligible participants or service providers in accordance with the provisions of sections 107, 203, or 263.

### **GENERAL PROGRAM REQUIREMENTS**

Sec. 141. Except as otherwise provided, the following conditions are applicable to all programs under this Act:

(a) Each job training plan shall provide employment and training opportunities to those who can benefit from, and who are most in need of, such opportunities and shall make efforts to provide equitable services among substantial segments of the eligible population.

(h) Funds provided under this Act shall not be used to duplicate facilities or services available in the area (with or without reimbursement) from Federal, State, or local sources, unless the plan establishes that alternative services or facilities would be more effective or more likely to achieve performance goals.

### **PROGRAM DESIGN - ADULT**

Sec. 204.(a) Essential Elements. -

(1) In General. - The programs under this part shall include -

(B) development of service strategies that shall identify the employment goal (including, in appropriate circumstances, non-traditional employment), appropriate achievement objectives, and appropriate services for participants taking into account the assessments conducted pursuant to subparagraph (A), except that a new service strategy for a participant is not required if the program determines it is appropriate to use a recent service strategy developed for the participant under another education or training program (such as the JOBS program);

### **PROGRAM DESIGN - YOUTH**

Sec. 264.(a) Year-Round Operation. - The programs under this part shall be conducted on a year-round basis. Services shall be made available on a multiyear basis as appropriate.

### **NON-DISCRIMINATION AND EQUAL OPPORTUNITY RULES**

29 CFR 34.2. Definitions. The term Applicant means the person or persons seeking JTPA services who have filed a completed application and for whom a formal eligibility determination has been made. The term Eligible Applicant means an applicant who has been determined eligible to participate in one or more titles under JTPA.



**HIGHLIGHTS OF COMMENTS SECTION OF INTERIM FINAL REGULATIONS**

The following principles are central to the Department's efforts to oversee and guide the implementation process:

An enhanced role for the private sector is key to an effective JTPA program. This includes participation in setting high standards for the content and acquisition of skills through training and linking training with job opportunities in the local and national labor market.

The JTPA performance standards based on program outcomes will be the basic measure of the accomplishments of the JTPA system. In setting performance standards, the Department will encourage interventions, program strategies, and arrangements that provide appropriate services to participants, enhance opportunities for long-term employment, and increase participant earnings potential.

JTPA programs must meet the highest possible standards for the use of public funds. Substantial attention was given in the Amendments to strengthening program management, procurement, and fiscal and accountability standards for the JTPA system.

JTPA and other human resource programs must have a workable system of relationships to jointly serve their participants. It is unlikely that any single program will have the capacity to meet all the training, educational, and service needs of a participant. The Department is proposing regulations that foster the development of joint relationships among programs in order to provide high quality comprehensive services to individuals and to increase the capability of JTPA programs in conjunction with other human resource programs to maximize quality services to individuals.

Sections 104(b)(6) and (13), 121(b)(3) and 122(b)(5)-(7) of the Act require the States and SDAs to set goals and report on program accomplishments. The Department expects that each State's and SDA's plans and activities will reflect the development of outreach and promotional materials and/or activities aimed at making women aware of the programs and the services available through JTPA, particularly of non-traditional training and placement opportunities. Examples of outreach materials include, but are not limited to, non-traditional career information modules, video and print materials on non-traditional career options (for counselors), recruitment brochures targeted at both the client and the employer, and dissemination of preexisting resource materials and/or model curricula. States may also wish to undertake statewide public education campaigns, similar to those conducted for literacy programs, on non-traditional training and employment opportunities.

The Amendments mandate significant changes in the front-end operations for most SDAs. The statute will cause major alterations in the intake structure and will necessitate revisions in the appraisal of each participant's capabilities, needs, and occupational goals.

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T A R G E T I N G



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 **INTRODUCTION TO TARGETING**

This portion of the Guide provides information intended to assist local SDAs in assessing their approach to targeting and making targeting decisions responsive to community needs within the context of the requirements set forth in the JTPA Amendments. Perhaps the key change in the Act is to make targeting the first decision in the planning process and to ensure that SDAs direct their efforts to serve populations who are most-in-need and can benefit from their services, at least 65 percent of whom must be targeted to specified hard-to-serve groups.

As the System Planning chapter indicates, the TOR function is interrelated to all the other processes and functions operating within the JTPA delivery system. TOR is affected by, and affects, other system functions. Targeting in particular plays a critical role in the overall program design process, and this role is key to implementing the JTPA Amendments.

The paramount goal of this chapter on Targeting is to illustrate some of the opportunities local JTPA programs have to both meet the letter and spirit of the JTPA amendments, and to tailor targeting decisions and the mix of participants to local conditions. A secondary but important goal is to emphasize and update you on the basic analytical tools available to local JTPA planners to improve targeting decisions.

The first part of this chapter stresses the central place targeting has in the local planning process. The importance of putting targeting first in the planning process, of considering targeting decisions in light of desired outcomes and then designing and modifying services to meet these ends is the core of this discussion. Then we turn to specific methods and techniques you can use in your analysis work. The emphasis is on updating how we look at published demographics and how we can learn much more by using alternative sources of information to identify hard-to-serve groups. Later sections discuss Managing the Targeting Function and some targeting challenges. The Working Example section includes examples of targeting activities as well as a comprehensive list of organizations as potential sources of information for your targeting.

## ► DEFINITION OF TARGETING

*Targeting is a strategic planning function which involves making conscious decisions about who among the eligible population should be served by local JTPA programs.*

Targeting is a critical component of the local JTPA strategic planning system. Strategic planning, as noted in the first chapter, is a disciplined effort to produce fundamental decisions and actions that shape and guide what an SDA is, what it does, and why. Targeting decisions are strategic because they determine who the SDA serves and what outcomes the program is looking to attain. These decisions determine to a large extent what services are provided and to some extent who will provide these services.

We have shown that targeting is the lead strategic planning function. Targeting, decision-making about who the local JTPA program will serve, flows out of the PIC/SDA mission statement. The illustration on page 19 shows the relationship between targeting and strategic planning, operational planning, and the local job training plan.

The targeting function is a combined analytical/decision process which assesses and prepares information so that it may be considered by the policy making structure of the SDA. The targeting process is important because it can provide a more objective basis for making decisions about who the SDA ought to serve.

For purposes of this Guide, we are dividing the process into four basic activities, which are treated in detail in the Methods and Techniques section:

► *Gathering data...*

identifying, collecting and organizing information on specific groups of people experiencing difficulty in the labor market.

► *Analyzing data...*

developing reasonable estimates of the relative size and characteristics of specific groups of people experiencing difficulty in the labor market.

► *Recommending a course of action...*

assessing the implications of changes in the mix of target groups on services, outcomes, performance levels, and the delivery system.

► *Making targeting decisions...*

considering recommendations, modifying if necessary, adopting targeting mix and implementing the preferred mix through formal plans, service agreements and contracts.



## ► PURPOSE AND INTENT OF TARGETING

What is the purpose and intent of targeting in JTPA? The JTPA experience has brought about many changes in the local service delivery system. Among these developments is a rising concern and need to refocus the resources of JTPA on service to those who are most-in-need and can benefit from the program. The JTPA Amendments reflect this concern by emphasizing targeting and requiring that 65 percent of the people served by local programs be from defined hard-to-serve groups. The Amendments make it very clear that the intent of the JTPA is that targeting be the first decision in the planning process, and that targeting strategies should concentrate on the defined hard-to-serve groups.

*But the Amendments do not fill in all the blanks on targeting. Important questions remain.*

- *How should the SDA divide up services among the groups mandated in the amendments?*
- *What about the remaining 35 percent?*
- *What about community needs and priorities?*
- *Should the SDA define a "7th" hard-to-serve group as the Amendments allow?*
- *Should the SDA make suggestions to the Governor on what constitutes serious barriers to employment for the Older Worker and the Education and Coordination funds?*

Clearly, targeting is still a local decision area. So the reasons why we target have to go beyond the basic requirements of the Act and the Regulations.

At the SDA level, the chief purpose of targeting is to empower PICs with local choices that are flexible yet consistent with the requirements of the law, and DOL and state policies and regulations. Since we cannot serve all who are eligible, we need to identify those who will be served and use resources effectively for the greatest impact on identified groups. Research into who benefits most from employment and training services over the last 20 years consistently has shown that we can have the greatest impact on the hardest-to-serve.

*Consequently, a methodical and thoughtful targeting process will address four fundamental purposes:*

- *To identify those with the greatest need (most-in-need).*
- *To identify their employment barriers and skill deficiencies.*
- *To select "those who can benefit," considering long-term outcomes, from those identified as most-in-need.*
- *To meet community needs and priorities, and to leverage community resources through coordination to maximize the impact on those groups targeted.*

What are the consequences if we do not consciously target? The most obvious consequence is that we might not meet the 65 percent requirement of JTPA, and consequently would suffer penalties and restrictions on the SDA's freedom of action. More importantly, needs and priorities of the community might not be addressed. With the importance that a skilled workforce plays in today's global economy, inefficiency or lost opportunity exacts local penalties in lost jobs, plant closures, business failures and individual suffering. Our programs may seem relatively small, but they are the only opportunities that many people have. They must be directed to where they can have the most effect.

For those SDAs which have not actively targeted in the past, the key targeting decisions, simply put, make good business sense. The option of non-targeting, of course, still remains, but use of this option comes at a significant price. In the past, some SDAs found that applicants (both walk-ins and referrals) presented themselves for participation at about their incidence rates in the general eligible population. There was little need for an active recruitment program, except for the few cases where a particular group was noticeably being underserved. In fact today, some SDAs are finding that their current service levels to the designated hard-to-serve groups are in the vicinity of the 65 percent range required by the JTPA Amendments. Thus the temptation exists that if it isn't broken, it doesn't have to be fixed.

But JTPA at best is just able to scratch the surface in helping those who need help. To continue to accept participants on an ad hoc basis without seriously considering which groups in the community are the most-in-need and who can most benefit from program services, will increasingly become harder to justify, because it gives no clear signal to elected officials, community leaders, partner agencies, and the public-at-large what the JTPA mission really is.

Not targeting encourages redundancy of services, duplication of effort, ineffective leveraging and pooling of limited resources, and portrays the SDA as a passive rather than pro-active organization. On the other hand, a targeted program conveys a clearly understood mission and purpose and can more readily point to tangible results since services are focused on fewer groups, rather than trying to show an impact across a broader spectrum. The choice to target remains with the PIC and SDA Director. Their leadership and their choices will be judged by the elected officials and others in their respective communities on the results achieved and the image they portray.

Considerable benefit can come from methodical and deliberate targeting.

- Baltimore, Maryland, consistently has high impact programs because it meticulously targets skill deficient youth and adults.
- Yakima County, Washington, is having a significant impact on the employment opportunities opening for Hispanic eligibles because it carefully refocused its delivery system over a number of years based on strategic targeting analyses.
- The City of Los Angeles has significantly improved the quality, focus, and performance of its large scale at-risk youth programs through improved program design and systematic targeting.

What planning sequence does JTPA favor? Let's be more direct. The Amendments anticipate that SDAs will ensure better targeting of the program to those who, given the employment barriers they face,



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are considered to be hard-to-serve groups and are therefore most-in-need of JTPA services. In fact, Section 628.510(f) of the JTPA Regulations states that: ***SDAs that satisfy the requirements of sections 203(b) and 262 (b) pertaining to hard-to-serve individuals shall be deemed to meet the "most-in-need" criteria at section 141 (a) of the Act.***

*Only after targeting and outcomes have been considered  
are services to be designed.*

The skeptic could easily say, "Wait a minute. We've already got a program here. What are we supposed to do? Start from scratch?"

The JTPA Amendments are not suggesting this, but are saying:

1. Look at who you are serving. Are you serving those in your community who are most-in-need? Are these groups likely to benefit from the range of services that JTPA can provide? And this is important, make sure that at least 65 percent of those you serve are from these hard-to-serve groups.
2. What kinds of outcomes do you want? Are these outcomes realistic, considering the people you plan to serve? What is it you expect to achieve?
3. OK, now that you have selected who you want to serve and what you want to accomplish, design a package of services likely to get you there.

The System Planning Chapter in this Guide provides useful illustrations for identifying where TOR may fit in the local JTPA planning process. We presented the ideal planning sequence and four alternative approaches.

### CLASSICAL MODEL

**TARGETING ► OUTCOMES ► SERVICE DESIGN**

### ALTERNATIVE APPROACHES

**TARGETING ► SERVICE DESIGN ► OUTCOMES**

**SERVICE DESIGN ► TARGETING ► OUTCOMES**

**OUTCOMES ► SERVICE DESIGN ► TARGETING**

**PERFORMANCE STANDARDS ► TARGETING ► SERVICE DESIGN**



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The four alternative approaches used by SDAs show services being designed before outcomes are selected, targeting to fit existing services, targeting done after planning for desired outcomes and services and, finally, targeting to generate performance numbers with flexibility in selection of services. The sequence of choices in each of the four alternative sequences affects the range of options of subsequent choices. For example, if we select services before outcomes, then the range of outcomes is limited. If we select outcomes before target groups and services, then the range of target groups and our ability to serve the most-in-need with the range of services they need is limited.

These are useful ways to think about planning and targeting because they help you as you target to focus the analysis work. They also allow you to discern the implications of the alternatives.

*The bottom line is that JTPA wants targeting to precede other strategic planning decisions.*





## TARGETING AND EEO CONSIDERATIONS

Up to this point, we have attempted to make a fairly strong case for targeting based on need. However, we have not dealt with the issue of Equal Employment Opportunity (EEO). Many SDAs have indicated that they target only to meet their EEO requirements. But this is not targeting in the context the Amendments intend.

*The amended Law more than ever intends that targeting be the first decision made in the program planning process.* Section 141(a) requires that each job training plan shall provide employment and training opportunities to those who can benefit from, and who are most-in-need of, such opportunities and shall make efforts to provide equitable services among substantial segments of the eligible population. Thus, the primary requirement is to serve the most-in-need (at least 65 percent of whom must meet the hard-to-serve criteria) and who are able to benefit from JTPA services. The secondary goal is to make efforts to provide equitable services among substantial segments of the eligible population. The purpose of our targeting is not primarily to provide services to JTPA participants at or about their demographic incidence levels in the eligible population, but rather to meet the needs of populations who we consciously determined to be most-in-need of JTPA services. This may result in service levels that are at variance to incidence levels in the general eligible population.

If targeting results in focusing JTPA services on those determined to be most-in-need in the community, it is possible that those decisions may contribute to variations in service to significant segment groups. If this occurs, and if the SDA has otherwise made efforts to provide equity of services, then the SDA will not be penalized for their targeting decisions. For example, an SDA which targets a major portion of its program to welfare participants (who are 90 percent women) is not required to overserve males in other target groups to make the overall enrollment balance out to equity based on the general eligible population.

There is another aspect to the issue of equal employment opportunity. Is it appropriate to use such criteria as age, race or sex as target groups for the additional hard-to-serve category? While age, race and sex alone are not barriers to employment, many SDAs view them as such and may feel pressure to include them as a specific target group. However, in doing so, SDAs would be establishing conditions whereby otherwise eligible participants may be denied services because of their age, race, sex, etc., and such action would be discriminatory. Therefore, in selection of the additional hard-to-serve group, SDAs are warned against selection based on age, race or sex alone. By themselves they do not constitute a valid seventh category of hard-to-serve. What all the hard-to-serve groups should have in common is a clearly identified barrier to employment. This barrier impedes progress toward self-sufficiency, but does not exclude the age, race or sex characteristics of those with the barrier.



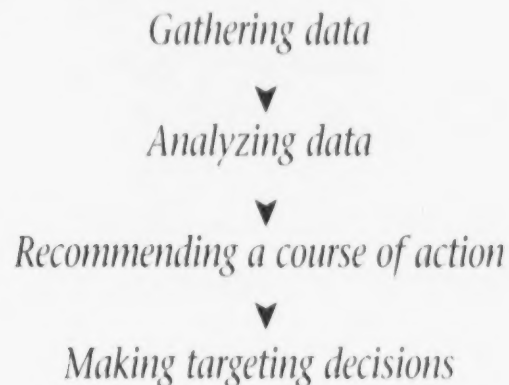
## ► METHODS AND TECHNIQUES FOR TARGETING

We have addressed why we target and what JTPA says SDAs should do. Much has also been said about the most-in-need and the hard-to-serve. But exactly what do we do to find out who needs employment and training services? Walk-ins and referrals are very important, but we must go beyond just looking at referrals and walk-ins off the street looking for help. Unless SDAs go further, we never know who else is out there, the nature and extent of their need for JTPA employment and training services or even how many people we need to consider.

Periodically, the local JTPA program needs to step back and systematically estimate the scope of the need for its services. We need to develop a better, more comprehensive picture of people having problems in the labor market. The methods and techniques of targeting are the specific tools and activities that are used to make these systematic estimates.

The targeting function is a combined analytical/decision process which assesses and prepares information so that it may be considered by the policy making structure of an SDA. The targeting process is important because it can provide a more objective basis for making decisions about who the SDA ought to serve.

It is useful to think of the process as four distinct components:



## T A R G E T I N G

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The majority of this section deals with gathering and analyzing targeting data. To appreciate the material on gathering data, we present you with four primary kinds of targeting analyses JTPA planners might conduct:

► *Compliance analyses...*

to determine if the SDA is meeting the 65 percent requirement. The primary data source for compliance analyses is the SDA's MIS data.

► *Community baseline studies...*

to estimate the size of target groups in the population. The primary data sources for community baseline studies are Census and non-JTPA agency data.

► *Special situations/special studies...*

to estimate the characteristics and needs of emerging target groups. These special studies use "alternative" data sources as well as MIS, Census and agency sources.

► *Feasibility of change studies...*

to estimate the effects of changes in the target groups served on outcomes, services and performance. These studies use primarily MIS data on past performance.

The following pages will outline the major choices in gathering, analyzing and using targeting information in decision making, and then turn to expanded illustrations.



## GATHERING TARGETING DATA

Gathering targeting data encompasses identifying, collecting and organizing information on specific groups of people experiencing difficulty in the labor market. We are particularly interested in the groups designated in JTPA Sections 203(b), 204(d) and 263(b), (d) and (f) as amended, relating to service to eligible people in the hard-to-serve categories.

There are four primary types of data that we could gather:

► *Management Information System (MIS) data...*

information on the target groups of interest in the participant management information system files.

► *Census data...*

from the decennial national census.

► *Agency data...*

participant statistics from non-JTPA programs serving the target groups of interest.

► *Alternative data...*

information garnered from interviews, surveys, collateral sources, and organizations that cross paths with the target groups in some way.

## MANAGEMENT INFORMATION SYSTEM DATA

The management information system (MIS), or participant information system, of your SDA is the single most important source of information for determining and managing compliance with the 65 percent hard-to-serve requirement. Most of the information needed to look at current and past target groups is in the MIS.

JTPA management information systems vary widely in their details but all contain some common elements. Participant records are maintained as files generally linked by social security numbers. They produce periodic set reports on participant progress and characteristics for local, state and federal purposes. Almost all permit ad hoc queries to extract information on specific groups of participants identified by means of personal or program characteristics.

The planner doing targeting analysis should have good access and understanding of this system. At a minimum, this person needs to be able to specify elements of queries so the MIS staff can run the necessary searches. Ideally, the planner should have the personal skills to work with the MIS data base interactively and develop a hands-on understanding of the characteristics of the SDA's participants.

There are three basic MIS data gathering tasks for the planner doing targeting work.

- *To search the MIS database of the current program for an unduplicated count of participants with one or more of the hard-to-serve 65 percent characteristics to determine compliance.*
- *To make an initial count of each category and a profile of its characteristics, including the other hard-to-serve characteristics, in order to determine the community baseline as a part of compliance and special targeting analyses.*
- *To isolate past placement performance for a specific hard-to-serve category, as a part of a special or feasibility analysis.*

Each of these MIS data gathering tasks is described in the section on Targeting Analysis later in this chapter.

## CENSUS DATA

Census data is collected for use in community baseline studies designed to estimate the size or incidence of the target group in the general or eligible population. The Census provides a variety of information on the population and its activities down to the block level. Considerable detail is available on the population including education, household composition, race, income, language, industry, occupation, ethnicity, age, housing, and many other variables.

There are two basic forms of Census data. The first type is the complete (or 100 percent) count data based on the standard questionnaire filled out by each household. The count data are contained in the STF-1 (summary tape file) and STF-2 files. The second type is the sample data based on information collected from the more detailed questionnaire filled out by a representative sample (about 19 percent) of all households. The sample data are contained in the STF-3 and STF-4 files. They include social, economic, occupational, educational, employment, and detailed housing characteristics in addition to the short form population and housing data. The important thing to remember is that all of the different Census products are based on the same summary tape files (STFs).

There are numerous ways to view Census data. The most accessible form of the Census is the standard Census publications which include tables for each SMSA (Standard Metropolitan Statistical Area). The most useful Census publication for SDA level JTPA targeting is 1990 CPH-3, Population and Housing Characteristics for Census Tracts and Block Numbering Areas.

For example, the planner using this document (1990 CPH-3) could estimate the number of adults in need of basic skills remediation in the SDA or in a smaller part of the SDA. The tables would show the approximate number of people 25 years of age and older who had less than an 8th grade education,



persons 18 and over who didn't speak English or didn't speak it well, unemployed people, and persons 18 to 59 years old who were living in poverty. This information could help the planner make a credible estimate of the number of people in the SDA in the JTPA "Basic Skills Deficient" category.

The standard Census publications are available about two years after the Census through the Federal GPO book stores. The publications are fairly self explanatory, inexpensive and durable. The prime disadvantage is that cross tabulations are limited to those already in the printed materials.

Most State Employment Service departments also produce SDA Census data compilations as one of the core labor market information products. The SDA tables prepared by Employment Security departments (or State planning agencies) for JTPA planning usually emphasize the variables of most interest to employment and training professionals. These tables are generally produced from the Summary Tape Files which allow greater flexibility in defining the geographic area covered and the cross tabulation of variables. The best source of special tables is often the Employment Service regional labor market analyst for the SDA area.

Customized Census tables may also be created or ordered from private firms and public agencies. In general this is not the preferred way to get Census materials unless the cost is nominal or the planner is very inexperienced.

Census data tapes and CD-ROM disks for on-line use are prepared and sold by the Census Bureau. Several private firms convert the Census tapes into high density disks for use on personal computers. This is the preferred approach for States and larger SDAs who expect to make ongoing use of Census data.

The Census data can be of considerable assistance in making estimates of the size or incidence of the target group in the general or eligible populations for the following designated hard-to-serve categories:

- *Basic Skills Deficient*
- *School Dropout*
- *Individuals with Disabilities*
- *Homeless People and/or Run-away Youth*

The following table provides a Basic Sources Crosswalk for Census and Agency Data Sources for estimating the numbers of people in the designated hard-to-serve categories in an SDA.



# **BASIC SOURCES CROSSWALK — CENSUS & AGENCY DATA SOURCES**

| CATEGORY                                           | CENSUS SOURCE<br>TAPE FILES | CENSUS SOURCE<br>PRINTED | TYPICAL CENSUS DATUM                              | PRIME AGENCY SOURCE                                                     | TYPICAL AGENCY<br>DATUM                                                 | SECOND AGENCY<br>SOURCE              |
|----------------------------------------------------|-----------------------------|--------------------------|---------------------------------------------------|-------------------------------------------------------------------------|-------------------------------------------------------------------------|--------------------------------------|
| Basic Skills Deficient<br>(II-A & C)               | STF 3                       | CPH-3                    | Educational attainment/<br>enrollment & language  | School Districts<br>ES/Job Service                                      | Standardized test data<br>Limited English; Appli-<br>cant & claims data | ES Applicant &<br>Claimant data      |
| Behind Grade Level<br>Youth Only(II-C)             | NA                          | NA                       | NA                                                | School Districts                                                        | Age distribution by grade                                               |                                      |
| Pregnant or Parenting<br>Youth Only(II-C)          | NA                          | NA                       | NA                                                | School Districts<br>Teen parent programs                                | #s Students w/ children                                                 | Teen parent<br>programs              |
| School Dropout<br>(II-A & C)                       | STF 3                       | CPH-3                    | Educational attainment<br>and enrollment          | School Districts<br>ES/Job Service                                      | #s dropouts yearly<br>Applicant & claims data                           | ES Applicant &<br>Claimant data      |
| Cash Public Assistance<br>(II-A & C)               | NA                          | NA                       | NA                                                | Pub. Assist. Agency                                                     | #s on caseloads                                                         |                                      |
| Offender<br>(II-A & C)                             | NA                          | NA                       | NA                                                | Corrections/Probation Depts<br>Juvenile Justice<br>Police               | #s under supervision<br>Gang youth estimates                            | Juvenile Justice/<br>Youth Authority |
| Individuals w/ Disabilities<br>(II-A & C)          | STF 3                       | CPH-3                    | Work disability                                   | VocRehab, Mental health,<br>Veterans agencies.<br>Disab. advocacy orgs. | #s on caseloads<br>#s in population                                     | Disabled Advocacy<br>Agencies        |
| Homeless People and/or<br>Run-Away Youth(II-A & C) | STF 1A                      | CHP-1,3                  | Group quarters<br>/emergency shelters<br>& street | Health Dept<br>Homeless networks                                        | Population estimates,<br>Shelter use counts and<br>demographics         | Homeless Taskforces/<br>networks     |
| SDA Designated Category<br>(II-A & C)              | STF 3                       | CHP-1,3,4                | Varied                                            | ES/Job Service                                                          | Applicant & claims data                                                 | Varied                               |

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## AGENCY AND ALTERNATIVE DATA

Serving the most-in-need increasingly means serving people with multiple barriers to employment. The identification of these targeted groups, and more importantly, knowing enough about them so that effective programs may be operated for serving them requires that the SDA use alternative information sources as well as the census and LMI sources that we are accustomed to using in our planning.

Agency data are participant statistics from programs serving the same target groups of interest to JTPA. Alternative data is information on the target groups of interest that we garner from interviews, surveys, collateral sources, and organizations that cross paths with the target groups in some way. Creating and using alternative sources of data such as local community human services needs analysis, data from other agencies, labor market surveys, and academic research is probably the single largest opportunity to augment JTPA targeting information. It may also be a necessity for SDAs who want to meet the letter and spirit of the targeting emphases of the JTPA Amendments.

### ALTERNATIVE SOURCES OF TARGETING INFORMATION

*There are three primary alternative sources of targeting information:*

- ▶ *Records and reports of agencies that already serve multi-barrier participants.*
- ▶ *Interviews with staff who already serve multi-barrier participants.*
- ▶ *Interviews with people who are potential multi-barrier participants.*

It's important to remember that JTPA operates in a State and local context replete with other human service providers, education agencies, and other major planning and funding mechanisms. We all know this, but it has become increasingly important that we use the planning and data resources of these other agencies if we are to effectively target the JTPA dollars and services and meet our accountability and performance requirements. Consequently, the alternative targeting analysis process begins with a systematic mining of the data of other agencies. This is both efficient and cost effective. By and large it's public data, so let's use it.

The systematic mining of the data of other agencies planning and data resources is the backbone of the effective targeting of JTPA dollars and services on the hard-to-serve required by the Amendments. If available, Unemployment Insurance claimant data, Employment Service applicant data, public assistance agency case load statistics, and the JTPA participant MIS data files are good sources of information on hard-to-serve target groups. We have also included a listing of many of the other possible sources of information on the specific hard-to-serve groups mentioned in the Amendments. The intent of the listing is to help you conduct the kinds of targeting analyses that will provide more information on the hard-to-serve populations in your communities. Listings of suggested alternative data sources for other targeted groups of interest are also presented.

## ALTERNATIVE DATA SOURCES FOR DESIGNATED HARD-TO-SERVE ADULT/YOUTH

### CATEGORIES IN SEC. 203(b) AND 263(b) AND (d)

#### 1. INDIVIDUALS WHO ARE BASIC SKILLS DEFICIENT [ADULTS AND YOUTH]

##### *Education Barrier*

- ▶ School district records, reports and studies
- ▶ CASAS or other criterion referenced test and assessment data from JTPA MIS files
- ▶ State education agency reports
- ▶ Education clinics
- ▶ GED provider agencies, such as community colleges, school districts, ABE agencies
- ▶ Community college records and reports testing data
- ▶ Employment service applicant and UI claimant data

##### *Limited English*

- ▶ Same as above
- ▶ Refugee and immigrant service agencies
- ▶ Voluntary refugee service agencies (VOLAGS)
- ▶ Local health department
- ▶ Mutual Assistance Associations & family organizations

#### 2. BEHIND GRADE LEVEL [IN-SCHOOL YOUTH ONLY]

- ▶ Same as above

#### 3. PREGNANT OR PARENTING [YOUTH ONLY]

- ▶ Teen Parent programs
- ▶ Family support centers, and nonprofits
- ▶ School district records, reports and studies
- ▶ State education agency reports
- ▶ Child care referral/provider agencies
- ▶ Parent effectiveness programs (PEPS)
- ▶ Visiting nurse agencies
- ▶ Local health department
- ▶ Foster care agencies
- ▶ Child protective service agencies
- ▶ Disturbed children/family serving nonprofits
- ▶ Parents without partners groups

#### 4. INDIVIDUALS WHO ARE SCHOOL DROPOUTS [ADULTS AND OUT-OF-SCHOOL YOUTH]

Many of the above sources can be used for this category as well. In addition you may consider other local human services agency client files on adult dropouts served. You should be aware that the data for this category is particularly limited.



**5. INDIVIDUALS WHO ARE RECIPIENTS OF CASH PUBLIC ASSISTANCE, INCLUDING RECIPIENTS UNDER THE JOBS PROGRAM [ADULTS ONLY]**

***AFDC/other***

- Welfare case worker
- Welfare rights organization
- Annual welfare agency reports
- Quarterly client reports
- School district records, reports and special studies
- JOBS, Agency case load characteristics reports

***Food Stamps***

- Food banks, meals programs
- WIC program
- Other organizations who serve low income people

**6. INDIVIDUALS WHO ARE OFFENDERS [ADULTS AND YOUTH]**

***Ex-Offenders***

- Probation and parole agencies
- Gang youth intervention programs
- Street youth agencies
- Juvenile justice system
- Police Department youth and gang workers and units

**7. INDIVIDUALS WITH DISABILITIES [ADULTS AND YOUTH]**

- Local office of vocational rehabilitation agency
- Local disabled advocacy organizations, including veterans organizations
- Local mental health agency
- Local health department
- AIDS/HIV assistance and advocacy organizations
- Hospital admittance data base, accessed through health departments
- Developmental disabled agencies
- School district records, reports and special studies
- US and State Departments of Veterans Affairs

**8. INDIVIDUALS WHO ARE HOMELESS AND RUN-AWAY YOUTH**

- Shelters, soup kitchens, missions staff
- Homeless advocacy groups
- Police community service officers
- Homeless taskforces/networks
- Local health department
- Street youth agencies

**9. INDIVIDUALS WHO ARE IN AN SDA DESIGNATED CATEGORY ESTABLISHED UNDER SUBSECTION 203(d) OR 263(h)**

## **OTHER DATA SOURCES FOR GROUPS OF SPECIAL INTEREST**

### **OLDER WORKERS**

- Area Agency on Aging
- Local senior centers
- Public housing authority
- ES JSC, UI programs
- American Association of Retired Persons
- Displaced homemaker centers

### **DISLOCATED WORKERS**

- State dislocated worker units, WARN notice records
- State labor councils
- Rapid Response dislocated worker initial surveys
- Company and union records

### **RACIAL AND ETHNIC MINORITY COMMUNITIES**

- Minority based organizations: Urban League, La Raza, etc.
- Minority churches
- School district student data bases
- Community college student data bases

### **MULTIPLE BARRIERS**

- Annual public assistance agency reports
- Welfare case workers
- Vocational rehabilitation agency
- Local disabled advocacy and service organizations
- Developmental disabled agencies
- Local mental health agency
- Minority churches
- School district records and annual reports
- Juvenile justice system, youth authority
- Child protection agency
- Police dept youth and gang workers and units
- Local health department
- Gay and lesbian organizations
- United Way planning staff
- Street youth programs
- Single parents
- Parents without partners groups
- Family support centers and nonprofits



## T A R G E T I N G

- Teen parent programs
- Child care referral/provider agencies
- Parent effectiveness programs (PEPS)
- Visiting nurse agencies

### **VETERANS**

- Veterans direct service organizations
- Veterans affairs offices/departments
- Veterans social/fraternal/advocacy organizations
- ES Veteran's Employment Service
- Veteran's Administration, outpatient operations

### **PUBLIC HOUSING RESIDENTS**

- Housing authority and project management
- Housing project tenants organization
- Housing authority security department
- Housing nonprofit agencies

### **RURAL**

- Community action agencies
- Migrant and farm worker organizations
- Local health department
- Rural letter carriers
- Grange and Farmer's Union groups
- 4-H programs, Agricultural Extension agents

### **SUBSTANCE ABUSE**

- Local health department
- Police department arrest records
- Drug treatment agencies and nonprofits
- Gay and lesbian organizations
- Local AA and similar groups

As an additional resource for the SDA planner, the following could be of assistance in obtaining information on non-traditional jobs for women.

|                                                       |                                                                             |
|-------------------------------------------------------|-----------------------------------------------------------------------------|
| Women's rights/affairs organizations                  | Displaced homemakers centers                                                |
| Equal Opportunity/affirmative action agencies/offices | State/local commissions for women                                           |
| Local "9 to 5" type groups                            | National tradeswomen network                                                |
| Trades training programs/community colleges           | Wider Opportunity for Women (WOW)                                           |
| Professional/technical organizations                  | U.S. Department of Labor, Women's Bureau<br>(National and Regional Offices) |

## T A R G E T I N G

The listing stresses agency written data sources; however, the staff and clients of the agencies should also be viewed as potential sources of targeting information. Contacts with agencies may also be used to set up interviews with staff who already serve multi-barrier participants. The planner should especially value the insights of line-level, direct service staff.

Here are some suggested questions to pursue:

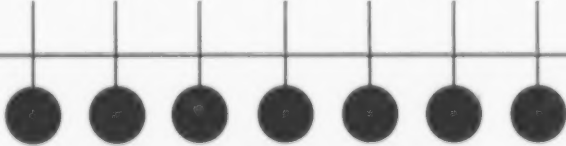


### **SAMPLE STAFF INTERVIEW**

- Do you serve this target group?
- How many do you serve?
- Do you have estimates of the size of this group?
- What data sources did you use to get a profile for this group?
- What services do you provide?
- What services do they need?
- What other agencies serve significant numbers of this group?
- Are there any special considerations that must be accounted for?
- What are the outcomes desired?

Similarly, interviews with people who are potential or actual multi-barrier participants of JTPA or clients of other agencies may provide valuable information for the targeting analysis. Our advice in this regard is simple: Talk to some potential participants before you make too many assumptions about them. Make a special effort to listen. Just ask the questions and listen. Don't get into too much advice giving. Talk to a number of people with the same barrier to get a feel for the diversity within the group. If you feel uncomfortable and out of place, just take these feelings as confirmation that you are learning something new. Planners who listen to real people talk about real problems and aspirations are better planners. The experience makes the cold numbers come alive.

Some basic questions to pursue in participant interviews:



## SAMPLE PARTICIPANT INTERVIEW

- Why did you choose this program?
- What job skills would you like to improve?
- Where do you go to get help with finding work?
- How does (employability barrier) affect your working life/job prospects?
- What would help you to get back on your feet in the job market?
- What holds you back from doing the kind of work you want to do?

More information on how to incorporate agency staff and participant interviews into targeting analyses is provided later in this chapter under Special Situations/Special Studies.

## **USING OTHER AGENCIES' PLANNING SYSTEMS**

Other agencies have planning systems, participant records and resources that contain information on target groups we often share. Time spent contacting these agencies with regard to their information resources may result in significant time savings in the analysis phase of targeting. Two systems which should not be ignored are the Community Development Block Grant (CDBG) and the United Way systems. These two systems are major human services funding and planning mechanisms which serve large numbers of low income people in most communities. CDBG and United Way funds flow to some of the same service providers funded by JTPA, and these service deliverers serve many of the people targeted by the JTPA Amendments. Coordination with these systems should be considered a must.

### **COMMUNITY DEVELOPMENT BLOCK GRANT**

The CDBG or Community Development Block Grant is a major federal funding system to municipalities. It is almost certain that your City or County has a CDBG, and a CDBG planning and funding process. It is very likely that some of the supportive services for your JTPA participants enrolled by community based or non-profit contractors are being paid for with CDBG funds. CDBG monies fund much of the job-search-only services no longer found in JTPA. Each municipality receiving CDBG funds operates a planning and contracting mechanism to distribute these funds. They also often evaluate and collect participant data which may be useful in the SDA's targeting analyses. The CDBG process is usually housed in a human services or community development department of municipal or county government.

### **UNITED WAY**

SDA targeting analyses might also benefit from closer contacts and information sharing with the local United Way. The United Way is the major funder for many smaller human service agencies serving the hard-to-serve groups emphasized in the JTPA Amendments. United Way is organized as a network of independent local affiliates. Each affiliate maintains a small secretariat to conduct the affairs at the local level. The local United Way organizations go through an annual evaluation, planning and targeting exercise that the SDA planner would find very familiar. United Way affiliates collect data on who their agencies serve. They also make estimates of the overall target populations in the community. Typically, the United Way is interested in many of the same groups targeted by JTPA. The agencies are generally accessible and often have information to share.

### **COMMUNITY ROUNDTABLES**

In an increasing number of larger metropolitan areas, groups of human service providers, planners, and funders have come together in collaborative bodies to share and sponsor joint planning studies of target groups. Often called human services "roundtables," these groups are typically regional in scope and are often sponsored by the United Way or a major local government. Where they exist, the roundtables offer the SDA another potential way to improve the informational context of its targeting efforts.

### **COMMUNITY COLLEGES**

The local community and technical colleges sometimes have substantial information resources that contain information on target groups of interest to the SDA. For example, throughout the Western States,



## **T A R G E T I N G**

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the community colleges are major deliverers of English as a Second Language (ESL) and other similar services to language limited persons. Many community colleges operate remedial basic education programs and single parent and displaced homemaker programs. The colleges keep records on their activities which may provide useful insights to the SDA targeting such groups.

### **STATE AGENCIES**

Another set of important players in the human services arena are State government agencies. Many of the local service units of these agencies have target groups in common with JTPA, although the nature of the problems they address may be different. We have already mentioned the Employment Service and the public assistance agencies. It would be difficult to operate JTPA programs in isolation from these agencies. And the SDA's rely heavily on State and local education agencies. JTPA working relationships with State programs such as vocational rehabilitation, adult basic education, and corrections are also important.

### **COMMUNITY-BASED ORGANIZATIONS**

Many Community-Based Organizations (CBOs) already have resources dedicated to serving the hard-to-serve. Tapping into the information and experience these groups have to offer should also help to make your data gathering task easier.

All this is to say that it's worth reminding ourselves that other agencies have planning systems, participant records and resources that contain information on target groups we often share. Time spent contacting these agencies in regards to their information resources may result in significant time savings in the analysis phase of targeting.

## **TARGETING ANALYSIS**

Analyzing targeting data entails developing reasonable estimates of the relative size and characteristics of specific groups designated in JTPA Sections 203(b), 204(d), and 263(b) and (d), as amended, relating to service to those in the hard-to-serve categories. The next few pages address four primary kinds of targeting analyses the JTPA planner might conduct:

- *Compliance analyses...*  
to determine if the SDA is meeting the 65 percent requirement.
- *Community baseline studies...*  
to estimate the size of target groups in the general population.
- *Special situation studies...*  
to estimate the characteristics and needs of emerging target groups.
- *Feasibility of change studies...*  
to estimate the effects of changes in the chosen target groups on program outcomes, services and performance.



## COMPLIANCE ANALYSES

Compliance analyses are conducted to determine if the SDA is meeting the requirement that at least 65 percent of the individuals served be from the specific groups designated in JTPA. Simply looking at the characteristics reports from the MIS generally will not confirm that the current participant mix will meet this requirement. The mandated characteristics are not a mutually exclusive set. Therefore, the participants may possess more than one of the characteristics. So, unless participants possess any single one of the characteristics, the reports will not confirm compliance with the 65 percent requirement.

Consequently, the first step is to search the MIS database for the current program for an unduplicated count of participants with one or more of the hard-to-serve 65 percent characteristics. To do this, the planner writes a search query of the MIS file that will include all participants with one or more of the hard-to-serve characteristics. The search query for the Title II-A program would look similar to this...

### *Search for...*

- ▶ *Standardized test level below X, or...*
- ▶ *School dropout, or...*
- ▶ *Cash public assistance, or...*
- ▶ *Offender, or...*
- ▶ *Individual with disability, or...*
- ▶ *Homeless, or...*
- ▶ *SDA designated category.*

The result will suggest whether the SDA will be able to meet the requirement. For example, the search of the MIS might indicate that 75 percent of the current Title II-A participants possess one of these characteristics. The search might also suggest that the current mix is less than 65 percent and therefore, some adjustments are needed.

If adjustments are needed to meet the 65 percent requirement, or the SDA wants to get a better handle on targeting, the planner needs to develop more information on the composition of the hard-to-serve group. This step can be difficult if we carry it too far. Again, the mandated characteristics are not a mutually exclusive set. Participants may possess more than one of the characteristics. Conceivably, we could be serving some people who are homeless, and disabled, and ex offenders, and who are high school dropouts with basic skills deficiencies. If we just take the six characteristics in the Act, we have 63 possible combinations to deal with.

A practical approach is to do an initial count of each category and a profile of its characteristics, including the other hard-to-serve characteristics. The initial count should pretty much correspond to the breakouts on the MIS participant characteristics reports and would look similar to the following illustration.



## **SAMPLE INITIAL COUNT**

### **MIS 1993 Characteristics**

|                             |         |
|-----------------------------|---------|
| Hard-to-Serve Category      | MIS/'93 |
| Basic Skills Deficient      | 25%     |
| School dropout              | 20%     |
| Cash public assistance      | 30%     |
| Offender                    | 5%      |
| Individuals with disability | 8%      |
| Homeless                    | 5%      |
| SDA designated category     | 12%     |
| Unduplicated Count          | 60%     |

The next step is to obtain a characteristics profile report on each of the hard-to-serve categories. The profiles will help the planner to understand the overlap of hard-to-serve participants and to inform the PIC about the need to change the mix of categories to meet the 65 percent requirement. A sample profile for the "Basic Skills Deficient" category is shown below.

## **SAMPLE PROFILE**

### **MIS 1993 Characteristics Profile**

#### **Basic Skills Deficient Category**

|                           | <b>Category Profile</b> | <b>All</b> |
|---------------------------|-------------------------|------------|
| Basic Skills Deficient    | 100%                    | 25%        |
| School dropout            | 75%                     | 20%        |
| Cash public assistance    | 50%                     | 30%        |
| Offender                  | 5%                      | 5%         |
| Individuals w/ disability | 5%                      | 8%         |
| Homeless                  | 10%                     | 5%         |
| SDA designated category   | 25%                     | 12%        |

The sample profile for the "basic skills deficient" category shows that dropouts are 20 percent of all participants, but 75 percent of all basic skills deficient participants. In this SDA, the two categories of hard-to-serve mostly overlap. On the other hand, offenders and individuals with disabilities do not overlap with basic skills deficient to as great an extent. Therefore, recruiting more dropouts to meet the 65 percent requirement implies more basic skills remediation in the service mix. Recruiting more offenders or individuals with disabilities to meet the 65 percent requirement would imply proportionately less basic

skills remediation in the service mix in this SDA. With a full set of characteristics profiles on each of the hard-to-serve categories, the planner can begin to look at changes in the mix of categories to meet the 65 percent requirement.

A similar use of the MIS system for compliance purposes is in checking to assure that 50 percent or more of the youth participants are out-of-school youth. By use of the data captured by the MIS, the planner can simply run a comparison of the out-of-school and in-school youth, excluding in-school youth who are expected to participate in a schoolwide project.

## **COMMUNITY BASELINE STUDIES**

Community baseline studies are conducted to estimate the size of target groups in the general and eligible populations. Simply looking at the characteristics reports from the MIS does not indicate whether the current participant mix reflects the mix of people in need of employment and training services in the eligible population.

The community baseline analysis examines the rationale for the current mix of participants and provides a basis for planning changes in participant targeting. The planner uses the information we described earlier (Census, agency and alternative) to estimate the incidence of hard-to-serve categories in the population, and then compares the current or planned service level to gain perspective on the SDA's targeted participant mix.

The result might look similar to the table below.

## **SAMPLE PROFILE**

| <b>MIS 1993 Characteristics Profile Community Incidence Profile</b> |                |                  |                  |
|---------------------------------------------------------------------|----------------|------------------|------------------|
| <b>Hard-to-Serve Category</b>                                       | <b>MIS/'93</b> | <b>Incidence</b> | <b>Deviation</b> |
| Basic Skills Deficient                                              | 25%            | 30%              | - 5%             |
| School dropout                                                      | 20%            | 15%              | + 5%             |
| Cash public assistance                                              | 30%            | 20%              | +10%             |
| Offender                                                            | 5%             | 15%              | -10%             |
| Individuals with disability                                         | 8%             | 10%              | - 2%             |
| Homeless                                                            | 5%             | 5%               | 0%               |
| SDA designated category                                             | 12%            | 25%              | -13%             |
| Unduplicated Count                                                  | 60%            | 75%              | -15%             |

The result will suggest whether the SDA needs to change its targeting to better meet community needs or to meet the 65 percent requirement.



## GEOGRAPHIC INFORMATION SYSTEMS IN COMMUNITY BASELINE STUDIES

The key to analyzing LMI and demographic data today is the use of geographic information systems, simply abbreviated to GIS. GIS is the generic term for data files and analytical software that link data to a specific coordinate on a map of a place. For example, if we have a data file of all the addresses of buildings in a city, and using this file we can make the computer plot a dot on a map to show us where the buildings are, we are probably looking at a GIS in action. Similarly, if that same file had data on the citizens who live in those buildings and their education levels, labor force status, and occupations... we could plot maps that showed us where in the city the people live who were employed, had less than an eighth grade education, and who worked in the service occupations. That would be pretty interesting if we wanted to target JTPA services to people with these characteristics.

It's important for the JTPA planner to become familiar with GIS which increasingly will be the main way to access and analyze demographic and LMI data. There is lots of available data, but often it is not for the place we are interested in. We always seem to want data at the community and neighborhood level because that is the level most relevant to the process of service delivery. GIS allows JTPA planners to work the data at more meaningful geographic levels.

## ELEMENTS OF A BASIC GIS FOR A JTPA TARGETING ANALYSIS

- ▶ A high end 386, 486 or MAC hardware platform and operating system, such as... MS-DOS 5.0, GUI/SUN, GUI/H-P UNIX, WINDOWS, or MAC.
- ▶ Census files STF3A block group data for the County or State of interest... from the Census Bureau in CD-ROM format, or a proprietary package for diskettes. (Sources for Census data in diskette formats may be found in current issues of "American Demographics.")
- ▶ GIS software to analyze and map data, such as MapInfo (TETRAD), MapPlan (Wordtech Systems), StatMap III (Geovision), Scan/US (Scan/US), Atlas (Strategic Mapping), Conquest (Donnelley Marketing Information Services, AutoCAD (Autodesk), and ARC/INFO (Environmental Systems Research Institute). For others, see trade magazines such as "American Demographics" and "Geo Info Systems."

*While ideally it would be nice to own the hardware and software to support a GIS analysis, a more viable option might be to rent, borrow or lease the equipment and software during the period it is needed.*

With a GIS, the planner is able to analyze the Census data down to the block level, specify custom study areas, look at population and education, household, race, income, language, industry, occupation, ethnicity, age, housing, and many other variables in the census files. The planner is able to look at the data in map form, as tables and as graphs. The demographic data on potential participants can be associated with streets, bus routes, service provider sites and many other site specific facilities. Data on past placements or employers can be added to the files and associated with the census data for the same locations. Data can be exported out of the GIS for use in other software.

These kinds of systems can be assembled off the shelf. However, many SDAs already have access to GIS. Many local governments have already purchased GIS systems for use in their public works and planning departments. This means that GIS is within the reach of most urban and suburban SDAs willing to make friends in local government. There has been little use of GIS as of yet by SDAs, but the potential is great.

## **SPECIAL SITUATION STUDIES**

"Special situation study" is a name we have given to ad hoc analyses of the characteristics and needs of emerging target groups, or to more closely consider a major change in participant targeting. A typical situation might arise because an SDA wanted to add an "SDA Designated Category" to the six categories in the Act. There are four basic stages in a Special Situation Study.

### **FOUR STAGES OF A SPECIAL SITUATION STUDY**

#### *First...*

identify the group the SDA is interested in from a review of its deliberations and the context of the requirements of the Act. What are the specific characteristics of the group to be studied?

#### *Second...*

identify the agencies and sources to contact relative to the group being studied.

#### *Third...*

arrange meetings; ask questions; and gain access to the data, reports and people that can inform us about the group.

#### *Fourth...*

draw up a composite picture of the group including their numbers, location, special characteristics, service needs, and potential for benefiting from the program.

Probably the best way to illustrate how special situation targeting studies might work is to describe one. The illustration shows how an SDA staff person took an assignment as an opportunity to improve JTPA targeting information on a group of prime interest to his PIC. Special studies are often a crucial step in serving hard-to-serve groups.

The staff person effectively used the Census for what it could tell him and then went on to exploit the three primary alternative sources of targeting information. He used records and reports of agencies who already interact with these multi-barrier participants, he interviewed agency staff who already have experience with the group, and he used these contacts to approach and interview people who are potential multi-barrier participants. With the information he learned, he was able to draw up a composite picture of the group of interest including their numbers, special characteristics, location, service needs, and potential success.





**IDEA...**  
**FOR A YOUTH**  
**GANG SPECIAL**  
**SITUATION**  
**STUDY**

The following is a fictionalized illustration. Following a series of high profile Eastside smash and grab burglaries, the PIC chair was asked by a community group and the Mayor to look into using JTPA services as a tool to serve youth gang members. The SDA staff needs to know who the gang members are, how many people are involved, what their employability situation is, where to find the youth, and what kinds of services might be required.

Jack Fong, a contract monitor, is assigned to develop information so the PIC can begin to see what can be done. Jack knows the Census isn't going to tell him much, but he checks out the Census tract printout that the City Community Development Department did of the 1990 Census anyway. He finds that the major communities affected are concentrated in two Central City tracts, the North end tract that includes the Latner Housing Project (nothing new here) and two Eastside tracts that straddle the Valley Boulevard. This was new.

Jack made a few calls and located Ann Green, a former college classmate, who is now working as a records analyst for the Police Department community relations unit. Ann says they have some information from the Gangs Unit that she could share. In her office, Jack reads over a raw intelligence report. The report identifies 45 known gangs and lists their territories and approximate membership. He decides to focus on the Eastside gangs and calls an East High counselor and two ESL aides whom Ann Green recommended. Fong learns which gangs are into heavy criminal activity and decides to focus his efforts on two Eastside gangs: the Project Boyz and the Wonder Street Rufnz.

Through his contacts at East High, Fong is introduced to Leroy Ellis, a Parks Department recreation worker at the Eastside Youth Center. Ellis agrees to set up some interviews between Fong and members of the Project Boyz and the Wonder Street Rufnz. The interviews provide Fong with a lot of insight on what is happening among youth on the Eastside and help him identify language and literacy training access as a key employability need for these youth.

Based on the data he has collected, the interviews with City staff working with the youth, and the interviews with the gang members, Fong is able to write up a special report. The report includes his estimates of the size, demographics and location of the gang youth, as well as Fong's recommendations regarding their service needs.

## FEASIBILITY OF CHANGE STUDIES

Feasibility of change studies are conducted to estimate the effects of changes in the target groups served on outcomes, services and performance. The principal data source for this kind of analysis is the SDA MIS and other outcomes information.

In all likelihood, the SDA has already served some people from most of the target groups identified in JTPA Sections 203(b); 204(d); and 263(b), (d), and (f) relating to service to those in the hard-to-serve categories. JTPA program outcomes data can provide a wealth of information about multi-barrier participants. It's logical that a systematic analysis of your MIS records on past participants from the hard-to-serve categories may be able to provide significant insights about others in the same groups you may want to target.

In most SDAs, some formal evaluation of program outcomes is done. Past evaluation studies should be reviewed to see if any of the hard-to-serve categories were singled out for analysis. If useful findings on any of the categories are found in recent evaluations, the planner may be able to economize.

The basic approach is to use the MIS client data base to create a pool of people from the target group of interest, develop a detailed profile of their experiences in our program, and then use this profile to judge how changes in the numbers of, or services provided to, these hard-to-serve categories might effect the shape and performance of the local JTPA program. The four basic steps which are used in this kind of analysis are discussed below.

► **First**, identify the key characteristics of the target groups of interest. Some of these may be demographic but most will be barriers to employment. Let's say, for example, we are interested in single female heads of household, with children, functioning at less than the eighth grade level, with limited English.

► **Second**, take these characteristics to the JTPA MIS staff and ask to run a search of last year's files and pull out the records of all participants who meet the search parameters. If no one meets the search parameters, first check to see if the search was done right, and, if it still comes out with no participants, you can't go any further with this approach and you need to try some of the other approaches suggested in this chapter. If you do draw a few participants out of the MIS, you can continue.

Now comes the fun part. Ideally, the MIS folks can run these records onto a disk that you can further assess on a personal computer. It's well worth your while to learn to do this if you cannot already. If you cannot work with the disk yourself, you need to cajole the MIS folks to work with you. The participant records on the disk may be formatted as a data base file or run into a spread sheet. Either mode should enable you to do tabulations and cross tabs. The data should be organized as a data base compatible with one of the popular PC data base software packages that allows interactive analysis via a cross tabulation facility and graphing.

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► *Third*, now it's time to play "what if games." Pretend that this is a sample of the larger group you want to serve. What else can you learn about them?

### STUDYING CHANGES IN TARGET GROUPS

Where do they live?  
What barriers to employment/hard-to-serve characteristics do they have?  
Which contractors served them?  
What services did they get?  
What occupations were they trained in?  
Were any of these occupations non-traditional jobs for women?  
Were they placed, and where were they placed?  
Who completed and was placed?  
How many were retained at follow-up?  
Who dropped out or was not placed?  
Can you find out why?

The point is to build up a picture as best as you can of this group of people. Are there any patterns or similarities to their experiences that the MIS data can reveal? The most important analysis is to learn what set of services yielded the most desired outcomes. Was a basic skills sequence or a particular set of occupational training components more productive than other sequences or components?

This kind of analysis is probably one of the best indicators of which characteristics and service patterns are most associated with successful service to the hard-to-serve categories. It is also probably the best information for addressing who can most benefit from JTPA services.

► *Fourth*, the same process may be used to assess the impact and costs of changes that you might consider in the mix of target groups served by the SDA. With the past experience in hand, you can make some judgements about what might happen if you serve more of a target group with one package of services versus another package of services. With even rough cost information adjusted for length-of-stay, you can obtain some basic insights into cost effectiveness of different mixes of hard-to-serve categories and service packages. There are some significant limits to this approach. If your SDA hasn't served a category, then you have no past to extrapolate from and, similarly, you may not have a "history" on all the service options to consider. Nonetheless, a great deal may be learned about the groups targeted in the Amendments by making full use of the information you already have in your SDA MIS.

## **RECOMMENDING A COURSE OF ACTION**

Recommending a course of action includes assessing the implications of changes in the mix of target groups on services, outcomes performance levels and the delivery system. Recommending a course of action is typically a staff function. Most of the analysis of alternatives will be done by an SDA staff person. But it is very typical that the staff person will be checking in with SDA management at interim points and working with a PIC committee during the process. The tempo and content of these interactions varies considerably. Therefore, it's not particularly productive to suggest how to manage your particular processes. Instead, we'll describe the staff work for recommending a course of action and assume that you will get appropriate input from your SDA management and the appropriate PIC committee along the way.

When the targeting analysis is complete, the planner should draw up a full list of all the possible recommendations for change. The listed items should be single sentences, with enough detail to distinguish among the real alternatives. If the analysis only points to two alternatives, only list two alternatives. For example, say the planner's compliance analysis found the SDA unlikely to meet the 65 percent requirement with the current participant mix. The set of alternatives would list the selection categories of participants (and increased numbers) most likely to bring the SDA into compliance.

The second step is to list probable implications of each alternative for outcomes, service needs and the service delivery system. Most of this information will be based on qualitative judgements and past performance experience. This is a good point to share findings with a committee, get their input, and modify if warranted.

The third step is to list out the advantages and disadvantages for each alternative. Is one alternative more likely than another to yield outcomes favored by the SDA? Is one more likely to improve performance? Is it possible to narrow the set of alternatives based on this assessment? Weed out alternatives that are not useful or worthwhile? This is another good point at which to share findings with a committee.

Finally, based on this assessment and your SDA's mission and goals, which alternative do you believe will improve the SDA's participant targeting? State the recommended course of action simply and directly in a written recommendation. Again, this is a good point to share findings with a committee, get their input, and modify if warranted before the recommended course of action goes up for decision.



## ***MAKING TARGETING DECISIONS***

Making targeting decisions encompasses considering recommendations, modifying as necessary and adopting a participant targeting mix, as well as implementing the recommended targeting through formal plans, service agreements and contracts. Making final targeting decisions is typically a joint management/PIC function. However, most often the real decision gets made incrementally as the staff person checks in with SDA management and gets input through the PIC committee process.

Typically the last round of the process includes formal presentation of the recommended targeting changes at a general PIC meeting and to the appropriate elected officials as a part of consideration of the annual plan. If the staff person has shared interim work with the committee and management and incorporated their input, recommendations will usually move ahead. But, if the collaborative side of the work has been neglected, or the recommendations are a major departure from community or service deliverer expectations, change may take a little longer.

Once adopted, the implementation of the recommended targeting mix becomes a staff function again. The formal plans are completed and submitted, and staff incorporate the new targets into service agreements and contracts through the SDA procurement process.



## ► MANAGING THE TARGETING FUNCTION

Previous sections of this chapter have dealt with the rationale and importance as well as the methods and techniques for doing targeting. Here, we deal with specific considerations of managing the targeting function within the SDA. The viewpoint taken is that of either the PIC or SDA Director as the program managers or of the planning staff person. A number of key functions are involved from scheduling the analysis and decision process to updating and finding new data. Training staff and coordinating with the larger community planning process and the SDA's internal management planning process are also discussed.

*Scheduling the analysis and decision process* is less of a problem if the planner doing targeting analyses recognizes the contracting cycle as the heartbeat of the local SDA's year. Analyses that lead to proposed changes require understanding and study by SDA leadership. Therefore, a strategy of constant incremental improvement in the targeting information and providing updates to the PIC on the analysis throughout the year will make them a part of the analysis process and allow them to incorporate the findings of the analysis into strategic decisions. Decisions should also include feedback loops for reconsidering prior decisions and addressing circumstances and constraints.

The same considerations are essential to *coordinating with the SDA's internal management planning process*. The PIC and the SDA planner both need to focus on providing targeting information that will allow the SDA to bring its mix of participants into conformance with the Amendments. The key is to schedule the analysis so that it may be used in the contracting cycle (or program planning cycle for SDAs that are service deliverers themselves). To mesh with this cycle, it may be necessary to concentrate on the hard-to-serve categories in the amendments as single defining groups and schedule analysis of multi-barrier groups and special groups for later refinement. As analysis work progresses, the planner needs to share findings with others in the SDA doing service design and contract development work. As decisions are made, the planner needs to make sure that others in the system have the information needed to direct outreach and recruitment efforts.

Having set a target goal or goals, what is the responsibility of the PIC and the SDA staff thereafter? That is, once a target goal is set, is it immutable? For example, if a target of 30 percent is set for any valid target group, should your SDA continue to reserve 30 percent of your participant slots and resources to this group throughout the program year if the participation rate by that group is not being maintained at 30 percent? The answer is, it depends. Certainly you can and should use the outreach and recruitment means available to achieve your targeted goal. But if these efforts are not successful, you cannot reserve slots indefinitely if this would result in preventing an otherwise eligible person, not of that target group, from participating in your program's services. This is also a clear signal that more research into the make-up, composition, geographic location and needs of the targeted group has to be done.

A target goal is just a goal based on the best available information the planner can find and analyze. If it needs to be changed, it should be. This may also require a modification to the job training plan, and

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may require the SDA to monitor its progress in achieving its goals throughout the year. The planning process, including a review of targeting decisions, should be dynamic, with continuous testing of assumptions against operational experience and new information on population, labor market and target groups.

*Updating data and finding new data sources* is an ongoing task that benefits from personal organization. The key to keeping current on Census updates and labor market information is to be "plugged into" organizations or individuals who make their living from the data. The planner needs to make that organization or individual his or her source and rely on that source to be current. For example, a county planning department will make sure it has the most current updates of the Census materials and probably does updates on its own. The planner who is already using that County's GIS will be using the current data. If they don't have a GIS, the planner needs to be on the regular distribution list for paper updates and ideally access the data in disk format if that is available.

Updating alternative sources is a little harder. Time spent on getting on distribution lists for published reports is well spent. Interview data collected by the planner however gets old and there is no alternative to recollecting this information.

Apart from being in the stream of information, experience shows that most local JTPA operations could make better use of the source material if they were more systematic in filing and retaining the source material. It seems simple, but having a filing cabinet exclusively for targeting source material would make the job easier. As materials come in over the year, these need to find a home in a filing cabinet organized by target group and or source. This one improvement would place a lot of information at the analyst's disposal that is now scattered all over the office.

*Training staff* to perform targeting analyses is another ongoing function. For the most part, targeting analysis will be only one part of a planner's job. Some formal training is planned as a part of the TOR project and the planner doing targeting should try to attend this training. This document offers a good set of entry approaches that the novice might apply, as well as some extensions of the state-of-the-art that more experienced planners might want to try. The Amendments raise the priority for good targeting analysis, and the planner may find more receptivity for requests for further training or time to improve the SDA's targeting information. The primary responsibility for staff training resides with the SDA Director. It is essential that the SDA Director send the right people to training and, given limited resources, they be selective in determining what training is appropriate. As a rule, send non-management staff to technical training and let them originate the recommendations for change that may result.

The major requirement for *coordinating with larger community planning processes* is time. As we have shown in prior sections, the JTPA planner doing a targeting analysis can access many sources of alternative data on hard-to-serve groups through community planning processes, such as the local United Way process and local government CDBG process. The planner can access this information by serving on a working group of these bodies or as a PIC liaison. This function, however, is a primary responsibility of the PIC, to assure that its training resources are not being wasted in unnecessarily duplicating what is

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provided elsewhere in the community. To the extent possible, the PIC should seek out opportunities to continue and expand coordination efforts with other community organizations for the betterment of their mutual clients.

*Collecting outcomes information on current and past target groups* requires that the planner doing targeting have good access and understanding of the local JTPA MIS. Most of the information the planner needs on current and past target groups is in the MIS. Specifically, the planner needs to be able to work with the MIS data base interactively; to bring the data base up on the terminal and have software that will allow for cross tab and search to isolate the characteristics of the target groups of interest. For a practical matter, without the personal skills to do this task, the planner will not be able to make the queries necessary to develop a hands-on understanding of how the SDA is serving the different groups, much less communicate it to others.



## ► **TRANSITION TO A MARKETING PLAN**

Targeting provides a foundation for outreach and recruitment in that the outputs of targeting decisions contribute significantly to outreach and recruitment goals and priorities. Information sources developed during the analyses can provide assistance for the outreach effort; the SDA learns exactly which agencies serve or come into contact with the targeted groups. Targeting data can also help the recruitment effort by pinpointing neighborhoods and communities where targeted hard-to-serve people are likely to be found. This chapter concludes with reference material on Working Examples and relevant citations from the Act and regulations. Subsequent chapters on the Marketing Plan, Outreach, and Recruitment offer you a compendium of ideas, activities and examples to help you enhance your programs for serving hard-to-serve people in local JTPA programs.

## ► WORKING EXAMPLES OF TARGETING

This section provides working examples of targeting activities used by SDAs. Included are examples dealing with...

- LMI: Using Employment Service Applicant and Registrant Data
- Personal Contact Techniques: Using Door-to-door Contacts in Ethnic Neighborhoods
- Personal Contact Techniques: A Second Example
- Agency Client Data: Using State Vocational Rehabilitation Agency Applicant Data to Establish a Pool of Participants for a new Program Serving the Disabled
- Periodic Targeting Reviews: Integrating Targeting Reviews into Regular Monitoring Activities
- Community-wide Needs Survey: Using a Sample Survey to Provide a Basis for the Employment and Training Services Policies in a New City
- Inter-agency Networking: Yields Targeting Information to Better Serve Refugees and Immigrants with Limited English
- Broad Targeting Studies: Laying the Groundwork for Long-term Agency Change
- Key Informants and School Data: Mixing Data Sources to Fill Out the Picture
- Geographic Information Systems: Using GIS to Assess Location Factors in Serving Targeted/ Homeless Persons
- Geographic Information Systems: Using GIS in Alaska ES
- Special Assessment Tools: Using a Dropout Prediction Scale to Develop Detailed Information on Targeted Youth Groups
- Using Department of Labor Market Analysis Reports to Determine Target Population
- Targeting and Serving the Most-in-Need



**WORKING EXAMPLES TO CONSIDER**

**EXAMPLE:** **LMI: Using Employment Service Applicant and Registrant Data**

**ORGANIZATION:** Kitsap County Job Training Center  
Bremerton, Washington

**DETAILS:** One of the best potential LMI sources of information on targeted groups is the Employment Service file of job applicants and unemployment insurance registrants. This file contains information on the characteristics and work experience of people looking for work. With adequate controls for the privacy of individuals and good working relationships with ES, you may be able to get the numbers and characteristics of potential hard-to-serve target group individuals registered with the employment service.

The Kitsap County Job Training Center in Washington State used this source to learn more about and recruit older workers. The Center was able to have a file of all Employment Security Department JobNet registrants, non-caucasian and 55 years of age and older, down loaded to the Center's computer.

**CONTACT:**



Kitsap County Job Training Center  
3721 Kitsap Way, Suite 8  
Bremerton, WA 98312  
(206) 478-4620

## WORKING EXAMPLES TO CONSIDER

- EXAMPLE:** **Personal Contact Techniques: Using Door-to-Door Contacts in Ethnic Neighborhoods**
- ORGANIZATION:** The Private Industry Council, East County Employment and Training Center (ECET)  
Gresham, Oregon
- DETAILS:** Sometimes there is no substitute for personal contact to gather information on a specific target group. The published data sometimes are weak on groups of interest to the SDA. For example, there is often little information on subgroups within the broad Hispanic category. Sometimes, there are no local data at all on groups such as the homeless. Consequently, it may be necessary to canvass in neighborhoods where people from the groups of interest are thought to live or frequent. The East County Employment and Training Center in Gresham, Oregon, uses door-to-door canvassing in its successful targeting/recruitment efforts in the Hispanic community.
- CONTACT:** The Private Industry Council, East County Employment and Training Center (ECET)  
55 NW 3rd  
Gresham, OR 97030  
(503) 667-7056



**WORKING EXAMPLES TO CONSIDER****EXAMPLE: A Second Example of Personal Contact Techniques**

**ORGANIZATION:** The Private Industry Council, Youth Employment Institute (YEI)  
Portland, Oregon

**DETAILS:** The Portland, Oregon, PIC's Youth Employment Institute (YEI) combines development of a network of interested agencies with one-on-one contacts in its successful effort to serve gang-affected and at-risk youth. YEI uses a network of referral agency contacts involved with at-risk youth to identify individuals and then follows with one-on-one contacts in the youth's home, on the streets, or in other places where the youth may be contacted. This effort has paid off in a better understanding of gang youth service needs and a significant word-of-mouth flow of referrals.

**CONTACT:** The Private Industry Council, Youth Employment Institute (YEI)  
1704 NE 26th Avenue  
Portland, OR 97212  
(503) 280-1058, 280-2801



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**WORKING EXAMPLES TO CONSIDER**

**EXAMPLE:**      **Agency Client Data: Using State Vocational Rehabilitation Agency Applicant Data to Establish a Pool of Participants for a New Program Serving the Disabled**

**ORGANIZATION:**    The Central Oklahoma Private Industry Council  
Oklahoma City, Oklahoma

**DETAILS:**          The client and applicant files of State agencies are one of the best sources of information on targeted groups. The Central Oklahoma Private Industry Council used State Vocational Rehabilitation Agency applicant data to establish a pool of participants for a new targeted training program serving the urban disabled. This approach allowed the PIC to focus on assessment, intake, supportive services and placement. Agencies, which specialize in serving single target groups, often are willing to provide information and referrals if this leads to additional employment and training services to their target group.

**CONTACT:**          The Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102-2447  
(405) 297-2940



## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Periodic Targeting Reviews: Integrating Targeting Reviews into Regular Monitoring Activities**

**ORGANIZATION:** The Seattle-King County Private Industry Council  
Seattle, Washington

**DETAILS:** The Seattle-King County Private Industry Council incorporates a review of program targeting in its regular agency/program monitoring activity. The monitor assesses who the program is enrolling and serving. The monitor reviews the most recent MIS reports on applicant and enrollee characteristics, skill deficiencies and CASAS basic education skills appraisal scores. The monitor compares the contract plan with actual enrollments and discusses major variances with the contractor.

To obtain a better picture of other significant characteristics and participant barriers that do not show up in the MIS reports, the monitor reviews a sample of participant files and discusses the results with the contractor. This is a good practice to ensure targeting discipline once targeting decisions are made and is also a useful, low-cost preparatory data gathering activity for the SDA anticipating a full review of its participant targeting.

**CONTACT:**

The Seattle-King County Private Industry Council  
Market Place One, Suite 250  
2001 Western Avenue  
Seattle, WA 98121  
(206) 684-7390



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## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Community-wide Needs Survey: Using a Sample Survey to Provide a Basis for the Employment and Training Services Policies in a New City**

**ORGANIZATION:** City of West Hollywood, Community Development Department  
West Hollywood, California

**DETAILS:** Incorporated only a few years ago, the new City of West Hollywood wanted to develop a base line assessment. Using a consultant to assist the process, the City designed and conducted a sample survey of the City population to determine the labor force status, occupational and industrial composition, job satisfaction, job change behaviors, employment barriers, and the employment and training needs of City residents.

To get more detailed data on special potential target groups, the City conducted intercept interviews with panels of homeless people, HIV/AIDS residents, gay and lesbian youth, older citizens and Russian immigrants. The City used the findings in discussions with the City Council, in the comprehensive planning process, and in its dealings with service providers. Considerable emphasis was placed on assisting City staff in developing in-house capacity and providing software to conduct similar survey studies in the future.

**CONTACT:** City of West Hollywood, Community Development Department  
8611 Santa Monica Boulevard  
West Hollywood, CA 90069-4109  
(310) 854-7475



**WORKING EXAMPLES TO CONSIDER**

**EXAMPLE:** **Inter-agency Networking: Yields Targeting Information to Better Serve Refugees and Immigrants with Limited English**

**ORGANIZATION:** Seattle-King County PIC  
Seattle, Washington

**DETAILS:** The Seattle-King County PIC has targeted a significant effort to meet the work place literacy and vocational ESL service needs and employability development of former refugees and new immigrants. To support this effort, the PIC has developed relationships and contracts with the State public assistance agency and the State Division of Refugee Assistance. Data on "newcomer" populations (primarily Asian, Eastern European and North African) in King County is transitory.

To facilitate its targeting effort, the PIC has actively supported and nurtured the development of a Refugee Planning Committee which now involves State agencies, the refugee serving volunteer groups, the Health Department, local refugee service non-profits, and others. This committee has become an important cooperative forum as well as the clearinghouse for all data on refugee and immigrant groups.

The information sharing now supports periodic county-wide estimates of target populations, service needs and growth and shifts in residency. The combination of many sources of information probably would not occur without this forum. The ability to develop a comprehensive picture has also contributed to success in grant writing and an increase in resources to serve this targeted group.

**CONTACT:**



Seattle-King County PIC  
Market Place One, Suite 250  
2001 Western Avenue  
Seattle, WA 98121  
(206) 684-7390

## WORKING EXAMPLES TO CONSIDER

**EXAMPLE: Broad Targeting Studies: Laying the Groundwork for Long-term Agency Change**

**ORGANIZATION:** Yakima County Department of Employment & Training  
Yakima, Washington

**DETAILS:** Yakima County, Washington is having a significant impact on the employment opportunities opening for Hispanic eligibles because it carefully refocused its delivery system over a number of years based on careful targeting analyses. Several years ago, the SDA laid the groundwork for change when it conducted an "Assessment of Needs for Employment and Training Services for Selected Special Groups". The groups studied included high-school dropouts, single parents, handicapped, Hispanic youth, and a separate staff study of older worker needs. The PIC took an active interest in these studies and they became a regular part of their deliberations. The SDA went on to look at an emerging street youth problem in Yakima. These basic targeting studies estimated the numbers of people in each group, their employment and training needs, current service levels and gaps in the services being provided.

The studies used a variety of information including Census figures, agency case load files and reports, key informant interviews with workers and employers, and school district and Community College data. Among other benefits, the assessment helped set the stage for PIC action to refocus some of their operations to the Lower Valley areas with large Native American and Hispanic populations. The SDA also began a long-term improvement effort to modernize their youth programming and basic case management systems.

**CONTACT:** Yakima County Department of Employment & Training  
Tri-Valley Private Industry Council  
630 East Yakima Avenue  
Yakima, WA 98901  
(509) 575-4252



**EXAMPLE: Key Informants and School Data: Mixing Data Sources to Fill Out the Picture**

**ORGANIZATION:** National Commission for Employment Policy  
Washington, D.C.

**DETAILS:** The National Commission for Employment Policy, under contract to MDC, Inc., wanted to assess the unmet basic educational needs of youth in Oakland, Philadelphia, and Albuquerque as a part of their policy deliberations. They engaged three consultants who traveled to these cities, conducted interviews with a variety of education and community informants, reviewed published and unpublished data sources and put together composite portraits of need in these three very different cities.

**CONTACT:** National Commission for Employment Policy  
1522 K Street NW, Suite 300  
Washington, D.C. 20005  
(202) 724-1545



MDC, Inc.  
1717 Legion Road, PO Box 2226  
Chapel Hill, NC 27514  
(919) 968-4531



# T A R G E T I N G

## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**           **Geographic Information Systems: Using GIS to Assess Location Factors in Serving Targeted Homeless Persons**

**ORGANIZATION:**   Department of Geography, University of Florida  
Gainesville, Florida

**DETAILS:**           The Department of Geography used a GIS based analysis to help the City of Gainesville develop a policy for zoning food distribution facilities that takes spatial and social factors into account. The analysis is a very clear demonstration of the potential of GIS to improve and expedite human services targeting analyses.

**CONTACT:**           Department of Geography  
3141 Turlington Hall, University of Florida  
Gainesville, FL 32611  
(904) 392-0494





## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Geographic Information Systems: Using GIS in Alaska ES**

**ORGANIZATION:** Alaska Department of Labor  
Juneau, Alaska

**DETAILS:** The Alaska Department of Labor has begun to use a GIS system to match the State's employer address files with the Census TIGER/Line file to automatically identify block locations by address. The Department has also used the system in a residential survey of off-base military personnel and to map housing ownership data.

**CONTACT:** Alaska Department of Labor  
PO Box 25501  
Juneau, AK 99802-5501  
(907) 465-4500



## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Special Assessment Tools: Using a Dropout Prediction Scale to Develop Detailed Information on Targeted Youth Groups**

**ORGANIZATION:** The Center on Education and Training for Employment at The Ohio State University  
Columbus, Ohio

**DETAILS:** Estimating the number and characteristics of potential dropouts can be a slippery exercise. The Center on Education and Training for Employment at The Ohio State University offers a procedure for identifying potential dropouts that is objective, systematic and computer scored. It looks like a useful tool for an SDA that wants to improve its targeting data on at-risk youth. The procedure obtains data from student questionnaires that address 13 of the most commonly looked-for characteristics among potential dropouts.

**CONTACT:** The Center on Education and Training for Employment at The Ohio State University  
1900 Kenny Road  
Columbus, OH 43210-1090  
(614) 292-4353



# T A R G E T I N G

## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**           **Targeting and Serving the Most-in-Need**

**ORGANIZATION:**   Virginia Department of Rehabilitative Services  
Shenandoah Valley Private Industry Council  
Local businesses and employers  
Harrisonburg, Virginia

**CHALLENGE:**       The Shenandoah Valley Private Industry Council is located in a very rural area covering ten counties and six small communities in the Northwestern and Western sections of Virginia. The population is 384,264. In 1983, when the Shenandoah Valley Private Industry Council was first formed, during one of the first Private Industry Council meetings, a PIC member made a very stirring speech about the commitment to serving the most-in-need in their area. At that time, the PIC made a personal commitment to serve the hardest to serve.

**DETAILS:**           Receiving their target group information from a number of sources — the census data, MIS reports and State Employment Service reports — the most-in-need group targeted were persons with disabilities. Beginning their targeted efforts in 1983, Shenandoah Valley PIC has since exceeded performance standards in serving those with disabilities. Working directly with the Department of Rehabilitative Services as their sub-contractor, a unique program was developed and proved to be very successful. They call the system "shadowing." An example is the adult who received head injuries from an accident, which left the individual without their former skills. The job counselor accompanied, "shadowed," the participant on site until the individual could do the work alone.

**CONTACT:**           Shenandoah Valley Private Industry Council  
PO Box 869  
Harrisonburg, VA 22801  
(703) 433-1495



## CITATIONS FOR TARGETING

### DEFINITIONS

Sec. 4. For the purposes of this Act, the following definitions apply:

(10)(A) The term "individual with a disability" means any individual who has a physical or mental disability which for such individual constitutes or results in a substantial handicap to employment.

(B) The term "individuals with disabilities" means more than one individual with a disability.

(17) The term "offender" means any adult or juvenile who is or has been subject to any stage of the criminal justice process for whom services under this Act may be beneficial or who requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction.

31) The term "basic skills deficient" means, with respect to an individual, that the individual has English reading or computing skills at or below the 8th grade level on a generally accepted standardized test or a comparable score on a criterion-referenced test.

(35) The term "hard-to-serve individual" means an individual who is included in one or more of the categories described in section 203(b) or subsection (b) or (d) of section 263.

(38) The term "school dropout" means an individual who is no longer attending any school and who has not received a secondary school diploma or a certificate from a program of equivalency for such a diploma.

### GOVERNOR'S COORDINATION AND SPECIAL SERVICES PLAN

Sec. 121.(c) Governor's coordination and special services activities may include -

(8) developing and providing to service delivery areas information on a State and local area basis regarding economic, industrial, and labor market conditions;

### STATE LABOR MARKET INFORMATION PROGRAMS

Sec. 125. (a) In order to be eligible for Federal financial assistance for State labor market information programs under this Act from funds available under section 461(b), the Governor shall designate the State occupational information coordinating committee or other organizational unit to be responsible for oversight and management of a statewide comprehensive labor market and occupational supply and demand information system, which shall -

(1) design a comprehensive cost-efficient labor market and occupational supply and demand



information system which -

- (A) is responsive to the economic demand and education and training supply support needs of the State and areas within the State, and
- (B) meets the Federal standards under chapter 35 of title 44, United States Code, and other appropriate Federal standards established by the Bureau of Labor Statistics;
- (2) standardize available Federal and State multi-agency administrative records and direct survey data sources to produce an employment and economic analysis with a published set of projections for the State and designated areas within the State which, at the minimum, includes -
  - (A) identification of geographic and occupational areas of potential growth or decline; and
  - (B) an assessment of the potential impact of such growth or decline on individuals, industries, and communities, including occupational supply and demand characteristics data;
- (3) assure, to the extent feasible, that -
  - (A) automated technology will be used by the State;
  - (B) administrative records have been designed to reduce paperwork; and
  - (C) multiple survey burdens on the employers of the State have been reduced;
- (4) publish and disseminate labor market and occupational supply and demand information and individualized career information to State agencies, area public agencies, libraries, and private not-for-profit users, and individuals who are in the process of making career decision choices; and
- (6) provide training and technical assistance to support comprehensive career guidance and participant activities for local programs assisted under this Act.

### **GENERAL PROGRAM REQUIREMENTS**

Sec. 141. Except as otherwise provided, the following conditions are applicable to all programs under this Act:

(a) Each job training plan shall provide employment and training opportunities to those who can benefit from, and who are most in need of, such opportunities and shall make efforts to provide equitable services among substantial segments of the eligible population.

[20 CFR 628.510(f). "Most in Need." SDA's that satisfy the requirements of sections 203(b) and 263(b) pertaining to hard to serve individuals shall be deemed to meet the "most in need" criteria at section 141(a) of the Act.]

(d)(1) Training provided with funds made available under this Act shall be only for occupations for which there is a demand in the area served or in another area to which the participant is willing to relocate, and consideration in the selection of training programs may be given to training in occupations determined to be in sectors of the economy which have a high potential for sustained demand or growth.



## **REPORTS, RECORDKEEPING, AND INVESTIGATIONS**

Sec. 167. (a)(1) For the purpose of applying the prohibitions against discrimination on the basis of age under the Age Discrimination Act of 1975, on the basis of handicap under section 504 of the Rehabilitation Act, on the basis of sex under title IX of the Education Amendments of 1972, or on the basis of race, color, or national origin under title VI of the Civil Rights Act of 1964, programs and activities funded or otherwise financially assisted in whole or in part under this Act are considered to be programs and activities receiving Federal financial assistance.

(2) No individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with any such program because of race, color, religion, sex, national origin, age, disability, or political affiliation or belief.

## **ELIGIBILITY AND SERVICES - ADULT**

Sec 203.(b) Hard-To-Serve Individuals. Not less than 65 percent of the participants in the program under this part, other than participants served under section 204(d), in each service delivery area shall be individuals who are included in 1 or more of the following categories:

- (1) Individuals who are basic skills deficient.
- (2) Individuals who are school dropouts.
- (3) Individuals who are recipients of cash welfare payments, including recipients under the JOBS program.
- (4) Individuals who are offenders.
- (5) Individuals with disabilities.
- (6) Individuals who are homeless.
- (7) Individuals who are in a category established under subsection (d).

(c) Special Rule. - Not more than 10 percent of participants in a program assisted under this part, other than participants served under section 204(d), in each service delivery area may be individuals who are not economically disadvantaged if such individuals are age 22 or older and within 1 or more categories of individuals who face serious barriers to employment. Such categories may include the categories described in subsection (b), or categories such as displaced homemakers, veterans, alcoholics, or addicts.

(d) Additional Category. - A service delivery area conducting a program assisted under this part may add one category of individuals who face serious barriers to employment to the categories of eligible individuals described in subsection (b) if-

- (1) the service delivery area submits a request to the Governor identifying the additional category of individuals and justifying the inclusion of such category;
- (2) the additional category of individuals is not solely comprised of-
  - (A) individuals with a poor work history; or
  - (B) individuals who are unemployed; and

(3) the Governor approves the request submitted under paragraph (1) and transmits a description of the approved request to the Secretary, as part of the Governor's coordination and special services plan under section 121.

### **PROGRAM DESIGN - ADULT**

Sec. 204.(d) Services for Older Individuals. -

(1) In General. - The Governor is authorized to provide for job training programs that are developed in conjunction with service delivery areas within the State and that are consistent with the plan for the service delivery area prepared and submitted in accordance with section 104, and designed to ensure the training and placement of older individuals in employment opportunities with private business concerns. The Governor shall ensure that the program under this subsection provides services throughout the State to older individuals on an equitable basis, taking into account the relative share of the population of older individuals described in paragraph (6)(A) within the State, residing in each service delivery area.

### **ELIGIBILITY AND SERVICES - YOUTH**

Sec. 263.(b) Hard-To-Serve Individuals Who Are In-School Youth. - Not less than 65 percent of the in-school individuals who participate in a program under this part shall be individuals who are included in one or more of the following categories:

- (1) Individuals who are basic skills deficient.
- (2) Individuals with educational attainment that is 1 or more grade levels below the grade level appropriate to the age of the individuals.
- (3) Individuals who are pregnant or parenting.
- (4) Individuals with disabilities, including a learning disability.
- (5) Individuals who are homeless or run-away youth.
- (6) Individuals who are offenders.
- (7) Individuals within a category established under subsection (h).

(d) Hard-To-Serve Individuals Who Are Out-Of-School Youth. - Not less than 65 percent of the out-of-school individuals who participate in a program under this part shall be individuals who are included in 1 or more of the following categories:

- (1) Individuals who are basic skills deficient.
- (2) Individuals who are school dropouts (subject to the conditions described in section 264(d)(2)).
- (3) Individuals who are pregnant or parenting.
- (4) Individuals with disabilities, including a learning disability.
- (5) Individuals who are homeless or run-away youth.
- (6) Individuals who are offenders.

(7) Individuals within a category established under subsection (h).

(e) Exceptions. - Not more than 10 percent of participants in a program assisted under this part in each service delivery area may be individuals who do not meet the requirements of subsection (a)(2) or (c)(2), if such individuals are within one or more categories of individuals who face serious barriers to employment. Such categories may include the categories described in subsections (b) and (d), or categories such as individuals with limited-English language proficiency, alcoholics, or drug addicts.

(f) Ratio Of Out-Of-School To In-School Youth. -

(1) In General. - Except as provided in paragraph (2), not less than 50 percent of the participants in the program under this part in each service delivery area shall be out-of-school individuals who meet the requirements of subsection (c), (d), or (e).

(2) Counting Of In-School Individuals. - In-school individuals served as part of a schoolwide project under subsection (g) shall not be counted as a part of the ratio of in-school individuals to out-of-school individuals.

(g) Schoolwide Projects For Low-Income Schools. -

(1) In General. - In addition to the individuals described in subsection (e), an individual who does not meet the requirements of subsection (a)(2) may participate in the programs assisted under this part if such individual is enrolled in a public school -

(A) that is located in a poverty area;

(B) that is served by a local educational agency that is eligible for assistance under chapter 1 of title I of the Elementary and Secondary Education Act of 1965 (20 U.S.C. 2711 et seq.);

(C) in which not less than 70 percent of the students enrolled are included in the categories described in subsection (b); and

(D) that conducts a program under a cooperative arrangement that meets the requirements of section 265(d).

(2) Definition. - For the purposes of paragraph (1), the term "poverty area" means an urban census tract or a nonmetropolitan county with a poverty rate of 30 percent or more, as determined by the Bureau of the Census.

(h) Additional Category. - A service delivery area conducting a program assisted under this part may add one category of youth who face serious barriers to employment to the categories of eligible individuals specified in subsection (b) and one category to the categories of eligible individuals described in subsection (d) if -

(1) the service delivery area submits a request to the Governor identifying the additional category of individuals and justifying the inclusion of such category;

(2) the additional category of individuals is not solely comprised of -

- (A) individuals with a poor work history; or
  - (B) individuals who are unemployed; and
- (3) the Governor approves the request submitted under paragraph (1) and transmits a description of the approved request to the Secretary, as part of the Governor's coordination and special services plan under section 121.

### **COOPERATIVE LABOR MARKET INFORMATION PROGRAM**

Sec. 462. (a) The Secretary shall develop and maintain for the Nation, State, and local areas, current employment data by occupation and industry, based on the occupational employment statistics program, including selected sample surveys, and projections by the Bureau of Labor Statistics of employment and openings by occupation.

(b) The Secretary shall maintain descriptions of job duties, training and education requirements, working conditions, and characteristics of occupations.

(e) The Secretary shall develop and maintain statistical data relating to permanent lay-offs and plant closings. The Secretary shall publish a report based upon such data, as soon as practicable, after the end of each calendar year. Among the data to be included are-

- (1) the number of such closings;
- (2) the number of workers displaced;
- (3) the location of the affected facilities; and
- (4) the types of industries involved.

(g)(1) Taking into consideration research previously conducted by the National Commission for Employment Policy and other entities, the Commissioner of Labor Statistics, in cooperation with the States, shall determine appropriate procedures for establishing a nationwide database containing information on the quarterly earnings, establishment and industry affiliation, and geographic location of employment, for all individuals for whom such information is collected by the States.

(2) The Commissioner of Labor Statistics shall determine appropriate procedures for maintaining such information in a longitudinal manner and for making such information available for policy research or program evaluation purposes or both, while ensuring the confidentiality of information and the privacy of individuals.

### **NATIONAL OCCUPATIONAL INFORMATION COORDINATING COMMITTEE**

Sec. 464.(b) In addition to its responsibilities under the Carl D. Perkins Vocational Education Act, the National Occupational Information Coordinating Committee shall -



- (2) give special attention to the career development and labor market information needs of youth and adults, including activities such as (A) assisting and encouraging States to adopt methods of translating national occupational outlook information into State and local terms; (B) assisting and encouraging the developing of State occupational information systems, including career information delivery systems and the provision of technical assistance for programs of on-line computer systems and other facilities to provide career information at sites such as local schools, public employment service offices, and job training programs authorized under this Act;
- (3) provide training and technical assistance, and continuing support to State occupational information coordinating committees in the development, maintenance, and use of occupational supply and demand information systems, with special emphasis on the use of cost efficient automated systems for delivering occupational information to planners and administrators of education and training programs and on improving the access of such planners and administrators to occupational information systems;
- (4) publish at least annually a report on the status of occupational information capabilities at the State and national levels, which may include recommendations for improvement of occupational information production and dissemination capabilities.
- (5) conduct research and demonstration projects designed to improve any aspect of occupational and career information systems and coordination and compatibility of human resources data systems operated by Federal agencies or the States, including systems to assist economic development activities and, where appropriate, provide support to States in the implementation of such system improvements.
- (6) provide technical assistance for programs designed to encourage public and private employers to list all available job opportunities with occupational information and career counseling programs conducted by administrative entities and with local public employment service offices and to encourage cooperation and contact among such employers and such administrative entities and public employment service offices; and
- (7) provide assistance to units of general local government and private industry councils to familiarize them with labor market information resources available to meet their needs.

### **NON-DISCRIMINATION AND EQUAL OPPORTUNITY RULES**

29 CFR 34.3. No individual in the United States shall, on the ground of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and for beneficiaries only, citizenship or participation in JTPA, be excluded from participation in, denied the benefits of, or denied employment in the administration of or in connection with any JTPA-funded program or activity.

29 CFR 34.4(b). In determining the types of services, financial aid or other benefits or facilities that will be provided under any JTPA-funded program or activity, or the class of individuals to whom such



services . . . will be provided, a recipient shall not use, directly or through contractual, licensing, or other arrangements, standards, procedures, or criteria that have the purpose or effect of subjecting individuals to discrimination . . . This paragraph applies to the administration of JTPA-funded programs . . . including, but not limited to recruitment, registration, counseling, testing, guidance, selection, placement, appointment, training, referral, promotion, and retention.

29 CFR 34.21. Recipients shall make efforts to provide equitable services among substantial segments of the population eligible for participation in JTPA. Such efforts shall include but not be limited to outreach efforts to broaden the composition of the pool of those considered for participation to include members of both sexes, the various race/ethnicity and age groups, and individuals with disabilities.

### **HIGHLIGHTS OF COMMENTS SECTION OF INTERIM FINAL REGULATIONS**

The following principles are central to the Department's efforts to oversee and guide the implementation process:

An enhanced role for the private sector is key to an effective JTPA program. This includes participation in setting high standards for the content and acquisition of skills through training and linking training with job opportunities in the local and national labor market.

Training services provided by JTPA should be of the highest quality and responsive to the needs of the individual participants and the labor market. The Department wants to establish a framework under which the processes used to assess the skill levels and service needs of individuals and under which participants are assigned to and receive training services will be most effective and efficient. The Department also recognizes that the JTPA system must be flexible and able to design and to deliver programs to meet local job training needs.

Section 628.510 describes the changes surrounding targeting and referral requirements. During the intake process, personal data on individuals are collected and a preliminary determination regarding suitability for Title II services is made. In order to focus program services on harder to serve individuals, not less than 65 percent of participants must have one or more barriers to employment as specified at the amended section 203(b) of the Act. The States and/or SDAs will establish procedures to ensure compliance with the targeting requirements and determining actions to address noncompliance with the requirements.

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# MARKETING PLAN



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## ► INTRODUCTION TO A MARKETING PLAN

We offer you this separate chapter, devoted to the Marketing Plan:

- *To highlight the benefits of deliberate planning for marketing and communications strategies.*
- *To show the advantages of creating a Marketing Plan that encompasses public relations, outreach, and recruitment activities.*
- *To provide guidance and suggestions on public relations activities that can enhance your program.*
- *To clarify appropriate cost categories for public relations, outreach, and recruitment activities.*

Our survey of Service Delivery Areas revealed that there are many JTPA programs across the country that have had both Marketing Units and Marketing Plans in place for some time — many since the inception of JTPA. Others have not given plans and public relations activities the same priority, often noting shortages of staff and resources. And, still others have been operating successful public relations, outreach, and recruitment activities, but perhaps not in the framework of a formal plan.

We hope to convince you that taking the time to develop a plan pays off. We will offer you a format for a Marketing Plan and share plans from many of your colleagues. We'll offer you examples of plans executed with limited resources... and others that have devoted considerable funds to their efforts.

Certainly, one of the most important audiences to consider in your marketing efforts is employers. However, for this Guide, we are addressing targeting, outreach, and recruitment for participants, and so, we will confine our information to activities for them. Nevertheless, we encourage you to include your employer relations efforts in your Marketing Plan where appropriate.

Our goal is to offer you a compendium of plans and ideas from which you can choose. Perhaps you are developing your first marketing plan, or maybe you are looking for fresh new ideas for your current plan. We'll suggest people to contact, ideas to use and concepts to explore.

Of course, you need to choose what is right for your program, select ideas that match your resources and create or enhance a plan that is appropriate for your program, that you can implement, evaluate and modify to fit your needs.



## MARKETING PLAN

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In our first chapter on System Planning, we offered our ideas on the importance of planning for targeting, outreach, and recruitment. Targeting we defined as a strategic planning function, with outreach and recruitment as the operational functions that flow out of targeting. With outreach and recruitment as the first functions in the program operations process, it does make sense that good planning for these activities will give you a solid foundation for all of your subsequent program activities. We suggest that attention be given to public relations activities which are important aspects of a complete communications strategy and vital to spreading your message to all of your audiences.

Not surprisingly, as we searched for examples of marketing plans, communications strategies and public relations approaches, we found many terms and definitions used for these activities. In this chapter, we have attempted to present what seem to be the most commonly used terms. Whether you call it a Marketing Plan or Communications Plan, Public Relations Strategies or simply outreach and recruitment activities... remember, the terms are not as important as the concepts behind them.

We focus on Marketing Plans with the belief that more methodical planning will bring added and often unanticipated results, that good planning will enable you to stretch your administrative and program dollars and that the foundation of a solid marketing strategy will increase your effectiveness in achieving goals for serving your targeted populations.

We hope you share this belief, and that you will find some new and exciting ideas — ones you can put to work tomorrow. We're confident that the time and resources you decide to invest will help to ensure the realization of your mission and the vision you have for providing JTPA programs and services in your community.

## ► DEFINITIONS

In this chapter, we present the concept of a Marketing Plan as the umbrella for public relations, outreach, and recruitment activities. The Marketing Plan is the "common plan" which flows from the PIC's mission, vision, strategic planning strategies, and program objectives. We will suggest a Marketing Plan format and then address public relations activities. The two subsequent chapters treat specific outreach and recruitment activities that could be included in a comprehensive Marketing Plan. To help clarify these terms as we are using them in this Guide, we offer you the following definitions. We also introduce you to the Crisis Plan — a valuable document in the event of a crisis that requires an organized and accurate response. Included is a description of when and why a Crisis Plan might be needed and a suggested format for this important document.

### **PUBLIC RELATIONS**

*Public relations is the function of providing Private Industry Council and Board members; federal, state, and local officials; and the general public with information about the JTPA program.*

### **OUTREACH**

*Outreach is the initial program operations function which establishes a positive foundation for recruitment. Outreach develops an awareness of the JTPA program and its services through communications and linkages with individuals, community groups made up of potentially eligible individuals and organizations which serve the targeted eligible population.*

### **RECRUITMENT**

*Recruitment is the program operations function which attracts potentially eligible targeted individuals and sells them on the benefits of participating in the JTPA program.*

## M A R K E T I N G   P L A N

While most programs do not make the fine distinctions between public relations, outreach, and recruitment as we have defined them, nearly all programs are devoting resources and time to activities in each. This is not to say that distinctions MUST be made. However, many of you responded to our market research with hopes that this guide would be an opportunity to define the differences for a number of reasons, among them the issue of cost categories.



## ► PURPOSE AND INTENT OF A MARKETING PLAN

*The purpose of a Marketing Plan is to provide a common document for public relations, outreach, and recruitment activities. All of these activities involve marketing and communications strategies... strategies that carry the mission of your organization, the image you project in your community and information about the services you provide.*

There are many benefits to creating a cohesive plan for all three activities. Your Marketing Plan can help to:

- Focus all of your communications strategies on your mission, vision, strategic planning strategies, and program objectives.
- Assist all staff in providing a clear and consistent message about your program to your audiences.
- Develop clear and concise goals and objectives for your public relations, outreach, and recruitment activities.
- Encourage the integration of targeting, public relations, outreach, and recruitment activities to maximize results and gain cost savings.
- Develop a systematic plan for implementation.
- Evaluate the success of your public relations, outreach, and recruitment efforts and make necessary changes to assure that goals are reached.

## **PUBLIC RELATIONS, OUTREACH, AND RECRUITMENT**

What are the differences between public relations, outreach, and recruitment activities? Understanding the differences will assist you in creating a Marketing Plan that addresses these three activities, all critical to the overall success of your program.

**THE MAJOR DIFFERENCE IS IN THE MESSAGE,  
NOT THE MEDIUM USED TO CONVEY IT.**



## **M A R K E T I N G   P L A N**

### **► PURPOSE**

- |                  |                                                                                                                                                                                                                    |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Public Relations | <ul style="list-style-type: none"><li>• To offer general information and respond to general inquiries about your program.</li><li>• To create a positive image of JTPA.</li></ul>                                  |
| Outreach         | <ul style="list-style-type: none"><li>• To create working partnerships with other agencies, organizations and individuals who serve the same populations.</li><li>• To make them aware of JTPA services.</li></ul> |
| Recruitment      | <ul style="list-style-type: none"><li>• To reach eligible and targeted individuals and attract them to your JTPA program.</li></ul>                                                                                |

### **► AUDIENCES**

- |                  |                                                                                                                                                                                                  |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Public Relations | <ul style="list-style-type: none"><li>• Private Industry Council and Board members, staff members, Federal, State and Local government officials, general public.</li></ul>                      |
| Outreach         | <ul style="list-style-type: none"><li>• Social service agencies, public agencies and organizations, community groups, and business and service groups that serve the same populations.</li></ul> |
| Recruitment      | <ul style="list-style-type: none"><li>• Individuals who are potentially eligible for JTPA services.</li></ul>                                                                                    |

### **► TECHNIQUES**

- |                  |                                                                                                                                                                                                                                                                                                          |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Public Relations | <ul style="list-style-type: none"><li>• May include a variety of printed materials, presentations and events, and activities designed to present general information.</li></ul>                                                                                                                          |
| Outreach         | <ul style="list-style-type: none"><li>• May include a variety of printed materials, media relations and materials, videos, speaker's bureau, meetings, and events designed to facilitate collaboration on behalf of participants.</li></ul>                                                              |
| Recruitment      | <ul style="list-style-type: none"><li>• May include printed materials, media relations and materials, audio and visual components and other activities such as door to door canvassing designed to reach targeted and other individuals who may be eligible for the JTPA program and services.</li></ul> |

### **► RESULTS**

- |                  |                                                                                                                                                                                                                                                         |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Public Relations | <ul style="list-style-type: none"><li>• Audiences are aware of your program's mission, vision, goals and services, informed of the role they play in achieving them and knowledgeable of how interested individuals can access services.</li></ul>      |
| Outreach         | <ul style="list-style-type: none"><li>• Audiences are more aware of your program's mission, vision, goals and services and ideally play an active role in coordinating projects and services and referring potential clients to your program.</li></ul> |
| Recruitment      | <ul style="list-style-type: none"><li>• Audiences know specifically what services you offer, how to access services and actively seek your services.</li></ul>                                                                                          |

### **► COSTS**

- |                  |                                                                                       |
|------------------|---------------------------------------------------------------------------------------|
| Public Relations | <ul style="list-style-type: none"><li>• Administrative</li></ul>                      |
| Outreach         | <ul style="list-style-type: none"><li>• Administrative and training related</li></ul> |
| Recruitment      | <ul style="list-style-type: none"><li>• Training related</li></ul>                    |





## **A WORD ABOUT COST CATEGORIES**

Because programs frequently do not differentiate between various activities for public relations, outreach, and recruitment, there is often confusion about cost categories. We offer here some general rules and guidelines along with specific citations from the regulations to assist you in determining appropriate cost categories for public relations, outreach, and recruitment activities.

- GENERALLY... public relations activities that provide information to federal, state and local government officials and the general public, are considered administrative functions per 20 CFR 627.440 (d)(5)(E).
- GENERALLY... outreach activities are authorized as training-related and supportive service activities under Sections 204 (b)(2) and 264 (c)(2).
- GENERALLY... recruitment activities are authorized as training-related and supportive service activities under Sections 204 (b) (2) and 264 (c) (2) as part of the concept of outreach.

A good rule of thumb... the message determines the cost category, not the medium. Activities to disseminate general information to general audiences will most often fall into the administrative cost category. Activities to disseminate more specific information to targeted organizations and individuals will most often be classified as training related costs.

Since it is impossible to specify the treatment of every conceivable item of cost, JTPA programs must apply the basic principle of costs being charged to the cost category in accordance with the benefit received per 20 CFR 627.440.

JTPA programs would want to exercise special caution about confusing job title with job function. The actual functions of any job may include activities that could be charged to more than one cost category. This may be particularly true when a single staff handles several aspects of the program's Marketing Plan which may include providing information for the general public (public relations — administrative), developing information for building awareness and partnerships in the community (outreach — training related) and assisting projects to bring in new applicants (recruitment — training related).

### **EXAMPLES OF DIFFERENT MESSAGES**

#### **PUBLIC RELATIONS:**

The PIC is interested in establishing itself as the pre-eminent service deliverer for employment and training in the southcentral part of the state.

The PIC develops various media strategies to establish its name in the community. For example, the PIC prepares a news release announcing its new grant and how many people it plans to serve.

Costs to be charged to administrative cost pool.

Explanation: The PIC's message is general and is self-serving. It supports the organization but is relatively distantly removed from service to the PIC clientele.

## **M A R K E T I N G   P L A N**

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### **OUTREACH:**

The PIC is interested in presenting its targeting strategy to other agencies and organizations which may be of assistance to them.

The PIC develops a more focused media strategy, with particular concentration in certain select organizations who it is hoped can be of greatest assistance, to establish its target goals in the community. For example, the PIC prepares a series of oral presentations, somewhat tailored for the specific organizational audience, to announce its goals and strategies, and to elicit their assistance and possibly partnership or co-sponsorship in that endeavor.

Costs to be charged to training-related category.

Explanation: The PIC's message is general enough to present to different groups but still tailored enough to maximally affect each group. While the message still supports the organization, its intent is to use those organizations to help mutual clients. NOTE: Mere attendance at inter-agency meetings, absent a specific message related to the PIC clients, would be an administrative charge.

### **RECRUITMENT:**

The PIC is actively seeking out enrollments from one of its designated targeted groups.

The PIC develops a very focused media strategy aimed directly at enticing eligible members of the targeted group to enroll for PIC services. For example, the PIC develops a brochure specially oriented toward the affected target group.

Costs to be charged to training-related category.

Explanation: The PIC's message is very specific and is aimed at one specific target group. While this message also still supports the organization, its intent is to actively recruit the very client group sought by the PIC.

## ► METHODS AND TECHNIQUES FOR A MARKETING PLAN

As we begin our discussion of marketing plans, it's important to acknowledge the myriad of plans that exist in Service Delivery Areas. Our search for marketing plans to feature in this Guide brought a representative sample of plans from across the country. We found programs with sophisticated, detailed, long-range marketing plans, with considerable resources allocated to activities, including the contracting of a public relations agency, backed by a dedication of full time staff to implement the plan. We found programs with more modest marketing plans, simpler in their scope and budget, necessarily creative in their activities and staff involvement, but nonetheless effective in achieving their goals. We also found many variations in between.

In this chapter, we offer you eight steps to the development of a marketing plan followed by a "fill in the blanks" form you may want to use as you develop or refine your SDA's marketing plan. The suggested steps and form are intended as examples for you to build from to customize your own plan. In the Working Examples Section, you'll find more detailed information on specific marketing plans from six SDAs. We encourage you to borrow from the good work of your colleagues to create a plan or to get some fresh new ideas for your current plan.

It is important to assure that staff from various departments of your program and PIC members are involved in the development of your plan. It probably goes without saying that the greater the investment of staff and others in your plan, the better your chances are of creating and implementing a successful plan. Many programs have created a Marketing Committee of their Private Industry Council to participate in the development of a plan and assist with progress. It is ideal if you have PIC representatives who bring business experience in public relations and marketing to the effort.

## ***DEVELOPING A MARKETING PLAN***

There are eight critical steps involved in the development and implementation of a marketing plan. We list suggested steps here, in the order that you may want to consider them.

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### **EIGHT STEPS OF A MARKETING PLAN**

1. Update or Create a Mission Statement
2. Take An Inventory of Your Audiences
3. Determine the Image you Want to Project
4. Create Major Objectives for Public Relations, Outreach, and Recruitment
5. Plan Activities for Public Relations, Outreach, and Recruitment
6. Finalize Your Marketing Plan
7. Implement Your Marketing Plan
8. Evaluate your accomplishments for Public Relations, Outreach, and Recruitment

You may want to refer to the suggested format for a marketing plan on page 135 as you consider these steps.

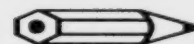
#### **STEP 1: UPDATE OR CREATE A MISSION STATEMENT**

Your mission statement serves as the “anchor” for all planning, and it surely is the focal point of your activities. It is the foundation for building a successful marketing strategy — for public relations, outreach, and recruitment. It sets the tone for what is to be communicated about your organization and the image you want to project to your various audiences. The mission statement is also the framework for making targeting decisions and for establishing specific targeting goals and objectives. These targeting decisions, in turn, contribute significantly to determining your public relations, outreach, and recruitment activities.

An ideal mission statement is short and concise. It presents briefly what you do for whom. It may include a statement of your vision and values. Many SDAs told us they benefited by annually reexamining their mission statement to affirm their direction, vision and values. During our research for this Guide, we were pleased to receive many examples of excellent mission statements. We offer you a few here.

## MARKETING PLAN

## NOTES



### ***FROM THE SAN DIEGO PRIVATE INDUSTRY COUNCIL, SAN DIEGO, CALIFORNIA:***

Our mission is: "To increase the level of employability among disadvantaged youth and adults in the County of San Diego."

This will be accomplished: "Through cost effective programs and partnerships among public and private sectors which remove barriers to employment and increase the level of self-sufficiency while satisfying local labor market needs."

### ***FROM TARRANT COUNTY PRIVATE INDUSTRY COUNCIL IN FORT WORTH, TEXAS:***

The mission of the Tarrant County Private Industry Council as a partnership of community resources is to build a quality workforce.

### ***FROM THE SHASTA COUNTY PRIVATE INDUSTRY COUNCIL, REDDING, CALIFORNIA COMES THE FOLLOWING, AIMED SPECIFICALLY AT PARTICIPANTS:***

#### *Our Vision*

Our business is to invest in your future. Our job is to help you get there.

#### *Our Mission*

Our purpose is to help you get the training and support you need to find and keep a good job.

#### *Our Philosophy*

We'll go out on a limb to help you succeed. When you win, we win, too.

### ***FROM THE ORANGE COUNTY PRIVATE INDUSTRY COUNCIL, SANTA ANA, CALIFORNIA:***

To bring together private and public sector resources and expertise to assist individuals in achieving economic self-sufficiency while meeting the economic and employment needs of local communities.

### ***FROM THE PINELLAS PRIVATE INDUSTRY COUNCIL, INC., CLEARWATER, FLORIDA:***

Through a public private partnership the mission of the Council is to prepare unskilled adults and youth for long-term employment within the local community and to make initial job placement.





## IMAGE FOR PIC AND LOCAL ELECTED OFFICIALS

Here's what a list may look like:

- "professional"
- "efficient"
- "responsive"
- "cost effective"
- "A professional organization providing well-trained workers for growing industries in the region."
- "The catalyst in creating comprehensive programs that respond to the community's needs."

A fun exercise is to have a brainstorming session with those involved in developing your Marketing Plan. Make lists of the attributes you want to convey to your audiences. Then, from those lists, create an image. Let's say you focus on the image for your PIC and local elected officials. Your list might start like the one pictured here.

Look at how you are presently communicating with each of your audiences and how that compares to how you want them to view your organization. In many instances, you may already be imparting the image you wish — perhaps some fine tuning of activities is all that is needed. Or, you may choose to focus some of your activities on changing the image you think you have.

Take the opportunity to verify your image with members of your various audiences. Check out your own assessment by conducting informal surveys with selected audiences. Call them or visit them. Let them know you are concerned about your image. You might decide to hold informal focus groups to give you

feedback on your image. Keep notes on where you think attention needs to be given on your image so you can turn your ideas into action plans.

## STEP 4: CREATE MAJOR OBJECTIVES FOR PUBLIC RELATIONS, OUTREACH, AND RECRUITMENT

At this point, if you have followed these steps, you have "regrounded" yourself in your mission, completed an inventory of your audiences, studied the image you want to project, and have an idea of some specific areas you might want to address as you begin developing your objectives.

Your major objectives will be driven by what you need to accomplish in each area. You may have only one or two objectives for public relations whereas, you find that you have six or seven for recruitment. For example, you might create objectives such as these for public relations:

**OBJECTIVE:** To assure that all PIC members and local elected officials are thoroughly informed about our program and services so they can be ambassadors for JTPA in our community.

## **MARKETING PLAN**

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**OBJECTIVE:** To annually contact all State and Federal legislators to assure they have information about program successes.

**OBJECTIVE:** To adequately recognize the time commitment of PIC members and local elected officials to our program.

By their nature, objectives for public relations may not change much, but those for outreach and recruitment may necessitate more change as they are dealing with specific target groups, individuals, projects and funding.

Go ahead and create objectives for public relations, outreach, and recruitment. Try not to think about "How are we going to pay for this," or "We don't have the staff to handle this." Create your "ideals" to begin, then prioritize later and refine where necessary as you create your lists of activities to carry out the objectives.

### **STEP 5: PLAN ACTIVITIES FOR PUBLIC RELATIONS, OUTREACH, AND RECRUITMENT**

Once you have created some key objectives for public relations, outreach and recruitment that will project the image you want to further your mission, you're ready for the fun!

First, you'll want to look at activities that you are currently doing. Are they bringing you the results you want? Are you getting some new ideas from this guide that you want to implement instead? Or do you want to just try a new twist on an activity that already works for you?

Next, from the ideas that follow on public relations activities and the outreach and recruitment ideas in the following two chapters, consider creating some new activities. Also, browse through the chapters in Great TOR Ideas and Project Models for more creative ideas!

As you list a current or new activity, complete your list of what needs to be addressed to complete the activity. At this point, to encourage creative thinking and new ideas, treat your list as a draft. Once it's complete, you'll prioritize your needs, look at budget and staffing necessary and determine what can be included in your final plan.

Address each activity you are considering and complete these elements. Here's an example of an activity to create an annual report.

**ACTIVITY:** Creation of annual report (current activity)

**GOAL:** Distribution of an annual report that includes general information on program, examples of success stories and highlights our 10th year in business

**TARGET AUDIENCE(S):** All internal and external audiences with exception of participants and graduates. Rough number needed: 2,000

## MARKETING PLAN

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|                    |                                                                                                                                          |        |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------|--------|
| PERSONNEL:         | Marketing Unit manager — lead staff (half time for six weeks)                                                                            |        |
|                    | PIC Marketing Committee (Topic for next two meetings, Committee Chair to have more involvement)                                          |        |
|                    | Management Team (Topic for Monday staff meetings during development. Managers will assure input from their departments)                  |        |
| BUDGET             | Photography                                                                                                                              | \$ 300 |
| PROJECTION:        | Graphics design                                                                                                                          | \$1000 |
|                    | Production                                                                                                                               | \$5000 |
|                    | Mailing                                                                                                                                  | \$1500 |
|                    | IDEA: Approach PIC members about the concept of finding underwriters who could be credited — major employers who have used our services? |        |
|                    | IDEA: Approach the PIC member who is a professional photographer to take photos and get credit.                                          |        |
| TIMEFRAME:         | Publish in time for June annual meeting.                                                                                                 |        |
| PROGRESS MEASURES: | Secure at least half of funding from private sector. Publish on time.                                                                    |        |

In your plan, you'll want to create a section for evaluation of your activity including final budget and suggestions for changing or continuing this activity.

Complete your draft plan including activities for public relations, outreach and recruitment. You may find that a particular piece that you are creating for an outreach activity can, with a few additions, be used for a recruitment piece as well. Be creative about piggybacking efforts to stretch your dollars.

### STEP 6: FINALIZE YOUR MARKETING PLAN

Now that you have all of your great new ideas in your draft plan, it's time to prioritize your activities. Create your own list of criteria to prioritize activities. You may want to consider how the activity fulfills your mission, helps you reach target audiences, and estimates budget, staff and time needed.

Prioritize activities for each area — public relations, outreach, and recruitment — and then finalize your plan.

### STEP 7: IMPLEMENT YOUR MARKETING PLAN

It's critical that adequate staff and resources are devoted to the implementation of a marketing plan. If you have detailed out your steps for each activity, you have a good idea of exactly what will be required both in staff time and budget.

Involve PIC members and staff from various levels as much as possible — if not for actual work, at least for their professional support!



Be sure to keep folks up-to-date on your progress, especially those who invested time and energy in helping you draft your plan. Keep staff informed frequently, bring PIC members up to date at meetings and discuss details of budget and progress with your Marketing Committee.

Try to keep to your timelines and budget as closely as possible. However, remain flexible to change! If your target groups change mid-year or you experience massive layoffs and need to adjust outreach and recruitment activities, or your budget gets pinched, take a deep breath and go back to your plan and reprioritize your activities. Also, remain flexible to new ideas to implement your plan. For example, if you are meeting with other agencies and discussing marketing your programs, seize the opportunity to talk about some joint outreach and recruitment activities.

As you implement your plan, keep thorough notes on your goals for each activity and whether you reached them and track your budget closely. Make notes about what worked and what didn't for each activity, what you might do differently next time, others you might involve in activities. You'll need this information for the last step!

### **STEP 8: EVALUATE YOUR ACCOMPLISHMENTS FOR PUBLIC RELATIONS, OUTREACH, AND RECRUITMENT**

This is where you'll be glad you created some measurable goals for your activities! Of course, some goals can be measured quantitatively — the number of times an ad ran, how many brochures you mailed out. Other activities will require more subjective evaluation.

First, refer to the notes you have kept along the way as suggested above. Next, be sure you get feedback from your customers for each activity. Completing an activity on time, on budget are two important measures, but if you didn't reach your intended audience or get the desired response from them, you'll probably want to consider modifying the activity or trying something totally new...based on the feedback from your customers.

It's a good idea to update your plan on an annual basis. PIC members will be interested if the money invested in these activities has paid off. Especially if you have implemented new ideas, you'll want to know if the investment was worth it. And, as painful as it may be, if an activity truly did not pay off, you probably want to consider replacing it with a new activity.

And don't forget to celebrate your successes! When your activities bring the results you wanted, let people know... and thank them for their participation. Recognize staff, PIC members and other agencies who might have been involved. Take some time at a PIC meeting or staff gathering to congratulate those who participated. You've all put in a lot of hard work, pat yourselves on the back!



## JTPA MARKETING PLAN

## Objective

**Image to Project:**

[illegible]

# JTPA MARKETING PLAN

**Objective #3** To increase the number of participants in the summer youth program by 25%.

**Image to Project:** JTPA is THE place to go for your summer job! They have a team of professionals who work with youth on how to get and keep a job... and you usually land a job that puts money in your pocket!

| ACTIVITY                        | GOAL                                                                                                                                                             | TARGET AUDIENCES                                     | PERSONNEL                                                                                                                                                                                                                          | BUDGET PROJECTIONS                        | TIMEFRAME                                                                 | PROGRESS MEASURES                                                                                                        | CONCERNS TO ADDRESS                                                                                                                |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|---------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Create posters and flyers       | Display posters at locations around the community. Distribute flyers to potentially eligible summer youth through schools, activity centers and other locations. | Youth potentially eligible for summer youth program. | 5 Summer Youth Coordinators<br>Public Relations Coordinator<br>Chair of PIC Marketing Committee<br>Chair of PIC Operations Committee<br>2 youth who completed program last year<br>2 youth potentially eligible for summer program | \$3,000 available for design and printing | 3/15 Posters and flyers printed<br><br>4/1 Posters and flyers distributed | Posters displayed in 450 locations<br><br>Flyers distributed to sites with commitment to pass on to students             | That locations actually distribute flyers. (Consider ways to encourage, reward them.)                                              |
| ACTIVITY                        | GOAL                                                                                                                                                             | TARGET AUDIENCES                                     | PERSONNEL                                                                                                                                                                                                                          | BUDGET PROJECTIONS                        | TIMEFRAME                                                                 | PROGRESS MEASURES                                                                                                        | CONCERNS TO ADDRESS                                                                                                                |
| Orientation sessions at schools | Provide orientation sessions at public, private and alternative schools                                                                                          | Youth potentially eligible for summer youth program. | Summer Youth Coordinators (5)<br>School principals and counselors                                                                                                                                                                  | Staff time only                           | Make all presentations by April 15                                        | Contacts with schools to schedule sessions. Sessions held, posters displayed, and flyers distributed as part of session. | Are schools willing / able to schedule sessions? (Consider PIC members assisting with initial contacts to principals, counselors.) |

## ***DEVELOPING A PLAN FOR PUBLIC RELATIONS DURING A CRISIS***

No program should be without a plan for public relations during a crisis. Although you hope you'll never have to use it, if you need one, you'll be glad you have it. If you don't have such a plan, we strongly encourage you to take the half day or so it will take to develop one using the format suggested here.

### **SO, WHAT'S A CRISIS?**

It can be as simple as a negative editorial in the local paper or as complex as an investigation for fraud.

### **YOU PROBABLY WANT TO USE A PUBLIC RELATIONS PLAN IF:**

- ▶ there is public information circulating that puts your program in a negative light.
- ▶ you are put in a position of defending your program.

### **A PUBLIC RELATIONS PLAN IS DESIGNED TO ASSURE:**

- ▶ that there is a reliable funnel for information coming into your organization regarding the crisis.
- ▶ that a consistent, positive and complete message is communicated from your organization to targeted audiences.
- ▶ that, in the event of a crisis, it will be handled methodically and your audiences will be informed appropriately.
- ▶ that the mission and image of your organization remain intact.

We would add that if you have been conscientious about communicating the good news of your programs through your Marketing Plan activities, your audiences will more readily accept your message in the crisis.

## **FIVE ELEMENTS OF A PUBLIC RELATIONS PLAN DURING A CRISIS**

1. Develop Your List of Audiences
2. Determine Who Needs What Information When
3. Decide Who Will Receive and Distribute Information
4. Prepare Your Statement
5. Manage Information Flow throughout the Crisis

You can complete the first three steps before any crisis strikes, thereby establishing your critical network to manage the crisis.

### **1. DEVELOP YOUR LIST OF AUDIENCES**

Based on the crisis, you may need to add other audiences or be more specific by including particular names of individuals.

## 2. DETERMINE WHO NEEDS WHAT INFORMATION WHEN

Who needs an immediate phone call to inform them of the crisis?

This might include your PIC officers, local elected officials, management team, your State JTPA Office, and other SDA Directors in your State. You may also decide to inform all of your staff in an "emergency" meeting.

Who needs information by mail?

This might include remaining PIC members.

Who does not need to be contacted?

Who can and cannot be given information if they inquire?

## 3. DECIDE WHO WILL RECEIVE AND DISTRIBUTE INFORMATION

This may depend on the crisis at hand, but will normally call for the Executive Director and/or marketing, communications, or public relations representative to be the conduit of information. Staff should be cautioned not to receive or distribute any information regarding the crisis, unless specifically requested by the Executive Director or other appointed person.

## 4. PREPARE YOUR STATEMENT

You may want to actually write out a response that can be read or given to the media or other audiences. As the crisis progresses, you may want to change your statement.

## 5. MANAGE INFORMATION FLOW THROUGHOUT THE CRISIS

- ▶ Distribute the information you have determined is necessary for your various audiences.
- ▶ Keep PIC officers and other important audiences up to date.
- ▶ Stay on top of all developments in the crisis.
- ▶ Keep staff informed, even if just to let them know that everything is under control. Lack of information can be dangerous and allow staff to conjecture about the crisis.
- ▶ Remain accessible during the crisis.
- ▶ If it looks like a long-term situation, set up a regular process, such as a monthly written update, for informing key audiences.
- ▶ Be prepared to deal with the media during your crisis.
- ▶ Call others who have lived through a crisis... for advice and support!

We hope you are never in a position to need your Crisis Plan, but if you are, you'll surely face the crisis more calmly knowing you have a process developed to communicate with your critical audiences.

## ***PUBLIC RELATIONS ACTIVITIES WITH PIC MEMBERS, GOVERNMENT OFFICIALS AND STAFF***

### **PRIVATE INDUSTRY COUNCIL ACTIVITIES**

PIC members are among your most important audiences. They need to receive complete and regular information so they can, in turn, speak well of your program to their publics.

#### **RECRUITING PIC MEMBERS**



**IDEA...**

Remember the saying, "You never get a second chance to make a good first impression?" How you go about recruiting members to your PIC is extremely important. You'll want them to see you as a professional, efficient organization. One that will use their valuable time well and one that truly needs their expertise to make a difference for the unemployed in your community.

You may want to develop a PIC recruitment packet to send to prospective members. The Oregon Consortium, a 27-county SDA, sends a packet to prospects which includes:

#### **FOR A PIC RECRUITMENT PACKET**

Letter inviting them to consider membership

Membership Application

Statement of Expectations for Members (Included in Working Examples Section of this chapter)

One-page profile of their program

Mission statement

Examples of participant success stories

List of current PIC members

Description of membership — term of office, meeting schedule, etc.



The Oregon Consortium and The Oregon Private Industry  
Council, Inc.  
260 S. W. Ferry, Suite 102  
Albany, OR 97321  
(503) 298-4101

When new members or officers are appointed, be sure to send out a press release announcing their appointment, including a short description of your program and a recent success.



## MARKETING PLAN



**IDEA...**

**FOR A PIC  
ORIENTATION  
SESSION &  
MATERIALS**

### ORIENTING PIC MEMBERS

The Oregon Consortium also holds orientation sessions for their new members. They host the one-day session in their main office and begin with a brief overview of JTPA followed by short presentations by members of the management team. An informal lunch break gives remaining staff an opportunity to meet the new members.

Staff provides The Oregon Consortium Almanac to each new member. This 60-page, comb-bound booklet contains everything from general program information, performance statistics, budget information, flow charts of the organization, rosters of members, committees and subcontractors, honors and special programs, the PIC by-laws and a list of commonly used acronyms.

The Shasta County Private Industry Council in Redding, California produced a handy little booklet, "The PIC Primer" that uses a no-nonsense, informal approach to orienting people to their program. The 4" x 6", 40-page pocket guide includes "What is the PIC," purpose and mission statements, a profile of programs and information on their branch offices.



Shasta County Private Industry Council  
1220 Sacramento Street  
Redding, CA 96001  
(916) 246-7911



**IDEA...**

**FOR A PIC  
PRIMER**

It's important to educate PIC members so they can serve as "ambassadors" for JTPA in your community.

To accomplish this, you might consider a monthly newsletter to members, bringing them up to date on activities and including some participant and employer success stories. Here are two examples.



**IDEA...**

**FOR A PIC  
NEWSLETTER**

The Toledo Area Private Industry Council publishes an inexpensive though professional newsletter called "PIC — Your Workforce Resource," including information on new programs, profiles of new PIC members, announcement of new funding and interesting facts about their local workforce.



Toledo Area Private Industry Council, Inc.  
331 14th Street  
Toledo, OH 43624  
(419) 244-3900

## MARKETING PLAN



**IDEA...**  
**FOR A PIC**  
**NEWSLETTER**



The Private Industry Council of Northern Cook County, Illinois, publishes an appealing quarterly newsletter featuring model programs, participant success stories, PIC and staff recognition and other useful information.

The Private Industry Council of Northern Cook County  
2604 E. Dempster, Suite 502  
Des Plaines, IL 60016  
(708) 699-9040

"PIC it up!" is the quarterly newsletter of the Shasta County Private industry Council in Redding, California. Full of great photos and participant success stories, the newsletter is lively reading with punchy headings and an attractive layout.



Shasta County Private Industry Council  
1220 Sacramento Street  
Redding, CA 96001  
(916) 246-7911



**IDEA...**  
**FOR A PIC**  
**NEWSLETTER**

## GOVERNMENT OFFICIAL ACTIVITIES

Government officials are an audience needing special attention... think of them as your source for funding! Whether Federal or State legislators or local elected officials, government officials look at our programs with a different eye. They are most interested in the investments we make, how we spend our money, where we coordinate funding, and our outcomes.

Of course, it's best to establish some sort of personal relationship with government officials, and not just when you need them. New legislators and local elected officials should receive a basic orientation to your program, and then regular updates on your progress and successes. Remember to establish contact with a staff person — it is likely that you will have more time with them than the official. Establish yourself as their source for information on employment and training issues, then think of ways to keep in touch with them.

When you have special events or are announcing new programs, invite your government officials. Include them in photo opportunities and let them take credit for your successes. When they support your efforts — whether assisting you in getting a grant or voting on a bill that favors your program, be sure to thank them for their support.

## **BRIEFING PACKETS**

When elected officials are entertaining legislation regarding your program, your PIC members may want to offer them Briefing Packets to help them make an informed vote. Include general information about your program and successes and specific information about how their decisions will affect your services.

Always offer a quick, one-page synopsis — usually what the legislator will read. More lengthy background information may be reviewed by a staff person involved in employment and training. Of course, include them in your mailings for newsletters, annual reports and other updates on your successes.

## **STAFF ACTIVITIES**

Don't overlook the need to keep your staff members up-to-date on activities in your SDA — they are all salespeople for your program! Use the same principles for PIC members and government officials.

Make sure you orient new staff, educate them so they can speak well and knowledgeably about your program and ask for their input as you create your various public relations materials.

If you have multiple branch offices, you may want to consider a frequent update on activities. You can develop a one-page update, that might even be faxed. The more they feel a part of the "information loop," the more likely they are to take an active role in spreading the good news of your program.

# **PUBLIC RELATIONS MATERIALS AND SPECIAL EVENTS**

## **ANNUAL REPORTS**

Many Service Delivery Areas choose to publish annual reports as a way of touching base with all of their audiences. Reports traditionally feature success stories about participants, acknowledge the commitment of PIC members and staff and present performance and financial information.

Some basic points to address as you contemplate an annual report might include:

- ***Involve representatives of your target audiences in the planning of your annual report.***

You might create a committee including SDA Director, staff person responsible for the report, public relations agency representative if you are using one, PIC member, local elected official, state legislator, business person from your community, representative of another agency and perhaps a participant. Their participation does not need to be time intensive — one well-planned, comprehensive meeting may be all you need, followed by drafts sent out for approval.



► ***Create a specific objective and target audiences for your annual report.***

Know what you want to tell whom and be aware of how your various audiences receive information and perceive publications like annual reports.

► ***Consider creative ways to fund your annual report.***

Over the years, JTPA programs have been criticized — by local elected officials, businesses and taxpayers — for spending money on public relations activities such as annual reports. Specifically, state legislators have questioned the value of receiving traditional annual reports for numerous SDAs. It's important to be sensitive to criticism, but keep your objective in mind.

You might look for donations from businesses — particularly those that have benefited by your services. You might want to explore a joint report of a number of SDAs in your state or human service agencies in your community.

► ***Look at alternatives to the "traditional" format.***

Perhaps you can accomplish your objective for an annual report in other, less expensive or more effective ways. Probe your committee members about how they want to receive your message and consider other approaches — a simple four-page report, an oversized brochure, a folder with pockets with your annual report information that can be used throughout the year as a presentation folder. If you are using an advertising agency, ask them about alternative approaches for presenting an annual report.

You may find that your audiences would rather receive more frequent communications — newsletters or brochures — rather than an annual report. Be open to breaking with your own traditional practices to deliver what your audiences want!

► ***Request feedback on your publication.***

Once you have distributed your annual report, be sure to request feedback... and make suggested changes in the future.

In our search for examples of marketing pieces for this Guide, we received many attractive annual reports. If you are considering an annual report, or want some new ideas, we encourage you to write to these colleagues and get a copy of their report. You'll find some great ideas for the use of photos and color, treatment of success stories and ways to highlight PIC members. A list of those we received is included in the Working Examples section of this chapter.

## OTHER PRINTED MATERIALS

### PRESENTATION FOLDERS

Many SDAs sent us what we call Presentation Folders. Most are designed to tell the basic "story" of an SDA with a profile of services and participants, and include a pocket in which specific information can be added for particular audiences.



**IDEA...**

**FOR A  
PRESENTATION  
FOLDER**

An especially attractive presentation folder was sent by the Private Industry Council of Northern Cook County, Illinois. Incorporating their logo design and colors, they created a professional, informative folder that includes inserts on the Private Industry Council and specific programs. With a cut out for a business card, staff members can personalize correspondence and include other information.



The Private Industry Council of Northern Cook County  
2604 E. Dempster, Suite 502  
Des Plaines, IL 60016  
(708) 699-9040

The Shasta County Private Industry Council in Redding, California, features basic program information on their presentation folder with accompanying Fact Sheets on specific programs. They use photos, graphs and quotes in their materials very effectively.



Shasta County Private Industry Council  
1220 Sacramento Street  
Redding, CA 96001  
(916) 246-7911



**IDEA...**

**FOR A  
PRESENTATION  
FOLDER**

## SPECIAL EVENTS

Special events are an opportunity to boast about your programs, acknowledge participants and recognize PIC and Board members and staff. They are an occasion to celebrate your successes, get some media attention and spread more good news about JTPA throughout your community!

### ANNUAL MEETINGS AND AWARD CEREMONIES

Many SDAs host an annual meeting as an occasion to present their annual report, present awards to participants, employers and staff and recognize the commitment of PIC and Board members and partner agencies.

Some SDAs we heard from create exhibits of their model programs to show off their results. Award ceremonies are another great opportunity to send out press releases announcing award recipients and successful programs.



## **M A R K E T I N G   P L A N**

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### **JTPA ALUMNI ACTIVITIES**

At the urging of the National Association of Counties (NACo) several years ago, many SDAs held a JTPA Alumni Week to bring Federal and State legislators together with JTPA Alumni to hear success stories first hand. NACo provided excellent materials for SDAs to customize for their activities.

Activities ranged from a full week of open houses, luncheons and speeches to more simple one-day events. We understand that many programs found the results so beneficial, they have continued their annual Alumni Week. Others have instituted regular Alumni Luncheons, featuring JTPA graduates and have begun to include presentations from participants as a regular part of PIC meetings.

Although these activities do entail a fair amount of work, the benefits are well worth it. Many legislators and PIC members say they are more impressed by talking with participants than hearing about programs from staff.

## **MANAGING THE MARKETING PLAN FUNCTION**

Managing the development of a marketing plan and accompanying public relations activities requires the dedication of staff and resources that can often pose a dilemma for SDAs. In the face of decreasing resources, public relations activities are often the most vulnerable to cuts.

The first step is to assure that your organization is committed to the value of marketing and public relations as a necessary part of doing business. If you are looking for some "ammunition" for this discussion, call any of the SDAs with marketing plans featured in the Working Examples section of this chapter. Undoubtedly, they can give you a long list of the rationale for investing in these activities.

Of course, it's ideal to have a staff member solely responsible for marketing and public relations, but this is not always possible — especially in the smaller SDAs where staff members wear many hats. In these situations, you might want to create a team of staff involved in public relations, outreach and recruitment efforts who can devote at least a few hours a week to these efforts. Remember to include PIC members who may have expertise... or, if you don't have any, recruit one when you have an opening!

When resources are tight, look for creative ways to finance your marketing and public relations activities. Seek donations from businesses that have benefited by your services, partner with other agencies or SDAs or consider creating statewide efforts to maximize dollars.

Don't think that you have to create slick, polished, expensive materials to get your message out. Often, those pieces developed "on a shoe string" are more effective for their frugality — tax payers like to see their money spent wisely. We know of more than one SDA that has been criticized for "wasting our tax payer's dollars" with flashy, expensive materials.

Track your efforts closely so you can present a "cost-benefit analysis" for your activities, defend expenditures if necessary or request additional funding where efforts are particularly successful.

Pay particular attention to projects you do on a regular basis such as an annual report or annual meeting. Ask your customers what they like and dislike, or changes they would like to see, or ways they can see to cut costs. However, if you ask, be sure that you are ready to make some changes based on their recommendations.

### **OPTIONS FOR CREATING PROFESSIONAL MATERIALS**

Although many SDAs use public relations agencies to create a marketing plan and publish materials, we would suggest that the involvement of an agency is certainly not essential to producing professional, polished pieces that bring you the results you want. There are a number of options.

### ► *ENGAGE A PUBLIC RELATIONS AGENCY*

Given the resources, you may choose to contract with a full-service advertising or public relations agency. An agency can create excellent materials that meet the needs of your specific audiences. They might even be willing to share some cost-cutting ideas or show you how you can create your own materials from basic designs they have generated.

### ► *WORK WITH A GRAPHIC DESIGNER OR DESKTOP PUBLISHER*

More and more organizations are turning to graphic designers or desktop publishers. If you have some specific ideas about design (borrowed from your colleagues!) and color and you can write your copy, take your pieces to a designer or publisher and contract with them for a specified number of hours to give you ideas or camera ready pieces you can have printed.

### ► *DO YOUR OWN LAYOUT AND DESIGN*

Most SDAs have a "computer whiz" on staff who would love to try their hand at designing public relations materials. If not, you might want to consider sending a staff member to a class or requiring these qualifications when you have an opportunity to hire someone.

Again, borrow ideas from your colleagues, collect examples of pieces that you like and try your hand at designing. Then put on your thick skin and ask for feedback from your staff, PIC, Marketing Committee and others. We'll guess that you'll all get caught up in the creative process and put out some wonderful pieces!

## **TRANSITION TO OUTREACH**

If you already have a marketing plan and are actively pursuing public relations activities, we hope this chapter has given you some new ideas to try. If you are considering a marketing plan, we hope this provides you with the basic tools to create one.

If you are feeling limited in what you can do because of lack of resources, consider that many of your colleagues do operate their marketing plans and public relations activities on a shoe string. Further, many of these activities take more time and creativity than they do money, especially if you can borrow ideas you see here!

With this information on marketing plans and public relations activities, we hope you are eager to read on and get some great ideas on completing the two remaining sections of your marketing plan — outreach and recruitment activities.

Good luck and have fun!



## **WORKING EXAMPLES OF MARKETING PLANS AND PUBLIC RELATIONS ACTIVITIES**

The Working Examples Section of this chapter includes a variety of resources for you. We include overviews from several SDA marketing plans, a list of SDAs that have marketing plans and/or units that you may want to contact for information, and a few examples of PIC orientation pieces.

- ▶ Marketing Plan
- ▶ Public Relations Plan
- ▶ Marketing Plan for Program Year 1992
- ▶ 1991-92 Marketing Plan
- ▶ Customer Service Plan
- ▶ Marketing Plan
- ▶ Annual Reports
- ▶ Marketing Plans and Marketing Units
- ▶ Statement of Expectations for PIC and Board Members
- ▶ Restatement of Code of Regulations for the Private Industry Council
- ▶ Serving women, dropouts and welfare recipients
- ▶ A brochure that answers many JTPA questions



# MARKETING PLAN

## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**      **Marketing Plan**

**ORGANIZATION:**   Toledo Area Private Industry Council  
                         Toledo, Ohio

**DETAILS:**        This SDA's six-page Marketing Plan begins with the mission statement of the SDA and purpose of the Marketing Plan.

Three major goals are presented along with the primary target markets for each. A synopsis includes:

*Goal #1            Position the Toledo Area PIC as a leader in employment and training in our labor market area.*

Each audience is addressed with specific objectives and action steps to accomplish the goal. Audiences include:

*Employers*

*General Public*

*Federal, State, and Local Government*

*PIC, Board and Staff*

*Goal #2            Identify unmet goals to targeted groups whose service levels have not met the performance goals for client demographics and services. Audience with objectives and action steps include:*

*Clients — Adults and Youth*

*Goal #3            To meet the job placement goals of the PIC Audience with objectives and action steps includes:*

*Employers*

**CONTACT:**        Toledo Area Private Industry Council, Inc.  
                         331 14th Street  
                         Toledo, OH 43624  
                         (419) 224-3900



## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Public Relations Plan**

**ORGANIZATION:** Western Wisconsin Private Industry Council, Inc.  
LaCrosse, Wisconsin

**DETAILS:** The July 1, 1992 — June 30, 1993 plan includes three major goals with activities, budgets and target dates for each activity.

*Goal #1 Increase awareness of PIC and PIC activities and successes by general public, legislators, media and others.*

This goal includes 19 separate activities including: written reports to those targeted; development of a slide show and PIC newsletter; production of an annual report; preparation of public service announcements; newspaper advertising; development of a brochure; hosting of a recognition program with awards for clients and employers; distribution of press releases; application for national award; annual meeting with legislators; celebration of a "Decade of Service"; rewards for participants; yellow page advertisement; and the development of a plan for recruitment of targeted groups.

*Goal #2 Recognize PIC members and Local Elected Officials and their contributions.*

This goal includes six activities, among them: publicizing new and resigning PIC members and LEOs through newsletter and press releases, gathering information on members for newsletter "PIC Profile," recognizing new and retiring members with a membership certificates and plaques, and keeping a PIC member photo display in your central office.

*Goal #3 Maintain active involvement with local business and civic organizations.*

This goal addresses six activities including: maintaining PIC members in local civic/service/business groups; using professional PIC letterhead envelopes and business cards for all communications; arranging for PIC staff to make at least ten presentations to community groups using a slide presentation and printed materials; distributing PIC brochures throughout the community and using a variety of media to solicit support and involvement from the business community to help at-risk individuals.

**BUDGET:** \$5,500 Total budget (excluding wages and fringe)  
The annual report did not include a budget figure and some activities noted that donations would be sought to cover expenses.

**CONTACT:** Western Wisconsin Private Industry Council  
402 North 8th Street, 3rd Floor, PO Box 2908  
LaCrosse, WI 54602  
(608) 785-9936



## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**            **Marketing Plan for Program Year 1992**

**ORGANIZATION:**    Tarrant County Employment and Training and Private Industry Council  
Fort Worth, Texas

**DETAILS:**            Tarrant County's Marketing Plan focuses on five marketing goals, followed by objectives and strategies. The plan includes a Marketing Schedule.

*Goal #1                To promote services to all identified client groups addressed in the Tarrant County Employment and Training Plan for Program Year 1992.*

Two objectives are: increase knowledge of our services to groups we serve; and implement existing promotional campaigns and develop new campaigns where needed to communicate program's benefits to potential participants.

*Goal #2                To promote business/placement services to area employers.*

Two objectives are: identify employment needs of area employers and coordinate these needs with those of our clients so that our programs' performance standards are met and information employers of the benefits of using our agency as a resource for referrals to job openings and of outplacement services for laid off workers.

*Goal #3                To establish better name recognition in the business, education and news media sectors and to all targeted client groups.*

Two objectives are: Streamline all communications pieces to clearly identify us by one name and coordinate all marketing campaigns and activities so that all client groups are addressed.

*Goal #4                Continue to develop existing linkages with area resources and agencies and establish new ones.*

Objective is to clearly define what we do and what services we offer and at the same time, solicit information that can be useful to our applicants.

*Goal #5                Continue to increase participation from legislators and local elected officials.*

Two objectives are: to provide legislators and local elected officials information on changes in the JTPA Act and other critical issues and inform them of possible impacts these changes could incur on the SDA; and continue developing good communication with staff of legislators and elected officials.



## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

#### MARKETING

##### SCHEDULE:

Includes a host of activities including Summer Youth Awards Ceremony, National JTPA Alumni Month/GED Graduation, Christmas Open House, Job Fair, Youth In-School Awards Ceremony.

##### CONTACT:



Tarrant County Employment and Training  
2601 Scott Avenue, #203  
Fort Worth, TX 76103  
(817) 531-5690



## WORKING EXAMPLES TO CONSIDER

### EXAMPLE: 1991-92 Marketing Plan

**ORGANIZATION:** The Private Industry Council of Northern Cook County  
Des Plaines, Illinois

**DETAILS:** The PIC's Marketing Plan includes seven goals backed by a "PIC Message for Program Year 1991." This comprehensive plan won the National Association of Private Industry Council's (NAPIC) national award. The plan was created based on market research of six primary sources. Each goal is supported by detailed objectives and activities.

*Goal #1 Stimulate awareness in PIC's services and operations among government and municipal agencies, participants, public and private sector organizations, labor, education, and the northern Cook County community at large.*

Objectives include: conduct public relations campaign targeted at business, community, government and residents; conduct networking activities with target markets; conduct specific marketing events throughout the year.

*Goal #2 Increase corporate and business involvement in order to strengthen PIC's base of financial, training and operational resources.*

Objectives include: implement strategy for building corporate partnerships; and secure corporate commitments.

*Goal #3 Increase communication with participants*

Objectives include: establish a communication system to effectively recruit participants into the PIC's network of services; improve the relationship between clients, service providers and PIC staff; and establish a system to formally recognize program participants.

*Goal #4 Increased communication with potential employers in PIC's Service Delivery Areas.*

Objectives include: establish a communication system to effectively attract employers into PIC's network of resource partners; improve the relationship between PIC and businesses in its Service Delivery Area; and establish a recognition systems for employers who participate in PIC programs.

*Goal #5 Provide greater awareness of PIC services and the catalyst role of PIC and its Board of Directors in the community.*

Objectives include: encourage PIC programs to be visible in the community through the commitment and dedication of PIC Board of Directors and staff; and establish a recognition system for PIC Board of Directors, service providers and staff.

*Goal #6 Enhance PIC's corporate image through development of high quality marketing materials.*





## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

Objectives include: create a logo that represents the appropriate image of PIC; develop corporate materials that enhance and contribute to PIC's corporate logo; and develop other marketing materials that enhance PIC's corporate image.

#### Goal #7

*Establish PIC as a major force in economic development initiatives in northern Cook County.*

Objectives include: develop this theme with all resource partners; and promote economic development initiatives in northern Cook County.

The plan includes a description of specific anticipated results for each goal.

#### MESSAGE:

In Program Year 1992, the PIC voiced several messages to its Service Delivery Area:

- ▶ PIC's mission is to strengthen the quality and productivity of people and business through development of a world class workforce.
- ▶ PIC believes that the key to quality in companies is quality in people. Quality... without compromise.
- ▶ PIC serves as a broker, coordinator and catalyst to enhance employment and economic opportunities.
- ▶ PIC believes that accomplishment means partnership.
- ▶ PIC works to coordinate a comprehensive, systematic, regional, state and national effort to ensure a workforce driven by quality and productivity.

#### CONTACT:



The Private Industry Council of Northern Cook County  
2604 East Dempster Street, Suite 502  
Des Plaines, IL 60016  
(708) 699-9040

## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

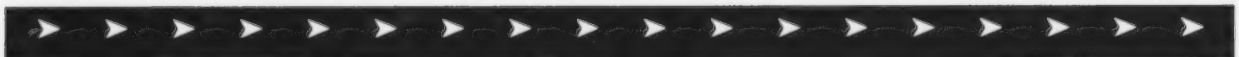
**EXAMPLE:**            **Customer Service Plan**

**ORGANIZATION:**    Palm Beach County Private Industry Council, Inc.  
West Palm Beach, Florida

**DETAILS:**            The SDA's Customer Service Plan, directed more specifically at client service, outlines five goals with objectives, strategies and expected outcomes.

- Goal #1            *Meet enrollment goals and ensure that programs are targeted to those "most-in-need."*
- Goal #2            *Improve quality of training and employment services in order to meet the needs of employers and customers.*
- Goal #3            *Improve customer success rate/wage at placement*
- Goal #4            *Improve customer employment retention rate*
- Goal #5            *Standardize systems and processes across programs and offices.*

**CONTACT:**            Palm Beach County Private Industry Council, Inc.  
600 South Dixie Highway  
West Palm Beach, FL 33401  
(407) 659-5213



# MARKETING PLAN

## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**           **Marketing Plan**

**ORGANIZATION:**   Southwest Minnesota Private Industry Council, Inc.  
Marshall, Minnesota

**DETAILS:**           This 40-page plan is one of the most comprehensive we received. It involves the participation of a Marketing and Development Committee and Marketing/Community Affairs Committee of the PIC and was based on a survey of "stakeholders" who identified strengths and weaknesses of the PIC's image, identity and stakeholder needs and wants.

The plan includes twelve goals with specific objectives and activities and a well-defined budget.

- Goal #1           *Increase communications with governmental and municipal agencies. Budget for 12 activities: \$5,116.00*
- Goal #2           *Increased communication with clients. Budget for 13 activities: \$10,720.00*
- Goal #3           *Improved communication with employers and SDA. Budget for 11 activities: \$8,135.00*
- Goal #4           *Improve the level of understanding and recognition of PIC by the general public. Budget for 15 activities: \$26,750.00*
- Goal #5           *Participate with all service civic organizations. Budget for three activities: \$800.00*
- Goal #6           *Greater recognition of PIC employees and Board members in the community. Budget for three activities: \$80.00*
- Goal #7           *New PIC logo. Budget for one activity: \$75.00*
- Goal #8           *Create new slogan. Budget for one activity: none*
- Goal #9           *Improve communication with educational agencies. Budget for five activities: \$790.00*
- Goal #10           *Improve awareness of PIC programs with social service agencies. Budget for four activities: \$845.00*
- Goal #11           *Increase pride and appreciation for the role of government programs in the lives of citizens of SDA. Budget for one activity: \$1000.00*
- Goal #12           *Establish PIC as major force in economic development in SDA. Budget for one activity: \$300.00*

Total Budget \$54,611.00

**CONTACT:**           Southwest Minnesota Private Industry Council, Inc.  
310 West College Drive  
Marshall, MN 56258  
(507) 532-4411



WORKING EXAMPLES TO CONSIDER

EXAMPLE:

**Annual Reports**

The following SDAs sent us their annual reports in response to a request for reports to share with other JTPA colleagues in this Guide. We hope that by sharing reports, you'll get some creative new ideas for yours!

Coosa Valley Private Industry Council, Rome, Georgia

Houston Works, Houston, Texas

Palm Beach County Private Industry Council, Inc., Palm Beach, Florida

Shasta County Private Industry Council, Redding, California

Southwest Minnesota Private Industry Council, Inc., Marshall, Minnesota

Tarrant County Employment and Training & Private Industry Council, Fort Worth, Texas

The Oregon Consortium and The Oregon Private Industry Council, Inc., Albany, Oregon

The Private Industry Council of Louisville & Jefferson County, Louisville, Kentucky

The Private Industry Council of Northern Cook County, Des Plaines, Illinois

The Private Industry Council of Westmoreland/Fayette, Inc., Greensburg, Pennsylvania

Toledo Area Private Industry Council, Inc., Toledo, Ohio

Weber-Morgan Private Industry Council, Inc., Ogden, Utah



# M A R K E T I N G   P L A N

## W O R K I N G   E X A M P L E S   T O   C O N S I D E R

### EXAMPLE

### Marketing Plans and Marketing Units

In addition to the marketing plans featured in this Guide, SDAs in the following cities currently have marketing plans and/or units as noted.

We're hoping that if you are looking for ideas on marketing plans or marketing units for your program, you might find among these, an SDA in your area that would be willing to share their advice and experiences. You may want to refer to your National Association of Counties Directory of SDAs for addresses and phone numbers for these programs.

| Location       | Marketing Plan | Marketing Unit |
|----------------|----------------|----------------|
| ARIZONA        |                |                |
| Yuma           | X              |                |
| ARKANSAS       |                |                |
| Harrison       | X              | X              |
| CALIFORNIA     |                |                |
| Anaheim        | X              | X              |
| Bakersfield    | X              | X              |
| Colton         | X              | X              |
| Concord        | X              | X              |
| Eureka         | X              |                |
| Hollister      | X              |                |
| Inglewood      | X              |                |
| Merced         | X              |                |
| Pasadena       | X              | X              |
| Redding        | X              |                |
| San Diego      | X              |                |
| San Francisco  | X              |                |
| San Mateo      | X              | X              |
| Santa Ana      | X              | X              |
| Suisun         | X              |                |
| Ukiah          | X              | X              |
| Visalia        | X              | X              |
| Woodland       | X              | X              |
| CONNECTICUT    |                |                |
| Bridgeport     | X              |                |
| FLORIDA        |                |                |
| Daytona Beach  | X              |                |
| Ft. Lauderdale | X              | X              |
| Indian River   | X              | X              |



# MARKETING PLAN

## WORKING EXAMPLES TO CONSIDER

| Location        | Marketing Plan | Marketing Unit |
|-----------------|----------------|----------------|
| Jacksonville    | X              | X              |
| Ocala           | X              |                |
| Orlando         | X              | X              |
| Panama City     | X              |                |
| Sarasota        | X              | X              |
| West Palm Beach | X              | X              |
| GEORGIA         |                |                |
| Atlanta         | X              |                |
| Decatur         | X              | X              |
| Savannah        | X              |                |
| HAWAII          |                |                |
| Honolulu        | X              | X              |
| IDAHO           |                |                |
| Boise           | X              |                |
| ILLINOIS        |                |                |
| Batavia         | X              |                |
| Champaign       | X              |                |
| Danville        | X              |                |
| Pekin           | X              | X              |
| Peoria          | X              | X              |
| Waukegan        | X              | X              |
| INDIANA         |                |                |
| Johnson City    | X              |                |
| Portland        | X              |                |
| South Bend      | X              | X              |
| Terre Haute     | X              | X              |
| Valpariso       | X              | X              |
| Portland        | X              |                |
| IOWA            |                |                |
| Creston         | X              |                |
| KENTUCKY        |                |                |
| Florence        | X              |                |
| MASSACHUSETTS   |                |                |
| Brockton        | X              |                |
| New Bedford     | X              |                |
| Pittsfield      | X              |                |
| MICHIGAN        |                |                |
| Benton Harbor   | X              |                |

# M A R K E T I N G   P L A N

## W O R K I N G   E X A M P L E S   T O   C O N S I D E R

| Location        | Marketing Plan | Marketing Unit |
|-----------------|----------------|----------------|
| Holland         | X              |                |
| Mt. Clemens     | X              | X              |
| MINNESOTA       |                |                |
| Annandale       | X              |                |
| Duluth          | X              | X              |
| Mankato         | X              | X              |
| Rochester       | X              | X              |
| MISSISSIPPI     |                |                |
| Gulfport        | X              |                |
| MISSOURI        |                |                |
| Joplin          | X              |                |
| NEW HAMPSHIRE   |                |                |
| Concord         | X              | X              |
| NEW JERSEY      |                |                |
| Morristown      | X              |                |
| NEW YORK        |                |                |
| Amsterdam       | X              |                |
| Buffalo         | X              |                |
| Canandaigua     | X              |                |
| Cayuga-Cortland | X              |                |
| Hampstead       | X              | X              |
| Oswego County   | X              | X              |
| Suffolk County  | X              |                |
| OHIO            |                |                |
| Canton          | X              |                |
| Circleville     | X              | X              |
| Cleveland       | X              |                |
| Marion          | X              | X              |
| Niles           | X              |                |
| Ravenna         | X              |                |
| Springfield     | X              | X              |
| Toledo          | X              | X              |
| OKLAHOMA        |                |                |
| Oklahoma City   | X              | X              |
| OREGON          |                |                |
| Eugene          | X              |                |
| Medford         | X              | X              |
| Portland        | X              | X              |

# MARKETING PLAN

## WORKING EXAMPLES TO CONSIDER

| Location       | Marketing Plan | Marketing Unit |
|----------------|----------------|----------------|
| PENNSYLVANIA   |                |                |
| Allentown      | X              |                |
| Harrisburg     | X              |                |
| Sharon         | X              |                |
| Westmoreland   | X              |                |
| PUERTO RICO    |                |                |
| Guaynabo       | X              |                |
| SOUTH CAROLINA |                |                |
| Charleston     | X              | X              |
| TENNESSEE      |                |                |
| Jackson        | X              |                |
| Johnson City   | X              |                |
| TEXAS          |                |                |
| Belton         | X              |                |
| Brownsville    | X              | X              |
| Corpus Christi | X              |                |
| Fort Worth     | X              | X              |
| Lufkin         | X              |                |
| Victoria       |                |                |
| Wichita Falls  | X              |                |
| VIRGINIA       |                |                |
| Harrisonburg   | X              |                |
| WASHINGTON     |                |                |
| Everett        | X              | X              |
| Kennewick      | X              |                |
| Tacoma         | X              | X              |
| Vancouver      | X              | X              |
| Yakima         | X              |                |
| WISCONSIN      |                |                |
| Dodgeville     | X              |                |
| LaCrosse       | X              | X              |

WORKING EXAMPLES TO CONSIDER

**EXAMPLE: Statement of Expectations for PIC and Board Members**

**ORGANIZATION:** The Oregon Consortium  
Albany, Oregon

The Oregon Consortium is a 27-county Service Delivery Area with a 22-member Private Industry Council and 27-member Board of Directors composed of one local elected official from each county.

**DETAILS:** Several years ago, the Public Affairs Committee of The Oregon Consortium's Private Industry Council and Board of Directors decided to draft a "job description" for new PIC and Board members to give them a better idea of what was expected of them as a member and what they could expect from staff members.

The Statement of Expectations is provided to those considering membership and then reviewed in the PIC/Board Orientation sessions for new members.

**STATEMENT:** Statement of Expectations for Members of The Oregon Private Industry Council, Inc. and The Executive Committee of The Oregon Consortium Board of Directors.

This Statement serves as a job description for members of The Oregon Private Industry Council, Inc. and the Executive Committee of The Oregon Consortium Board of Directors. It is intended to clarify roles and responsibilities and describe ways that members are expected to become involved in the operations of our organization. This Statement is not legally binding but is intended as an expression of good faith, providing a common ground from which members can operate.

1. Members are expected to support the values and goals of the organization.
2. Members are expected to attend a one-day orientation session, normally scheduled prior to their first quarterly meeting.
3. Members are expected to attend quarterly meetings and committee meetings. Executive Committee members are expected and PIC members are encouraged to attend our annual and mid-year Board of Directors meetings.
4. Members are expected to be aware of local issues and represent their districts at meetings. They are expected to review the agenda packet before each meeting and discuss issues with local program operators as needed. Members are expected to use the committee structure.
5. Members are expected to gain a basic understanding of JTPA services, organization and local program services and special projects. They are also expected to seek information and clarification on issues through other members, committee meetings and staff.

## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

6. Members are expected to market the program in their communities through chamber meetings, business organizations, and other opportunities.
7. Members are expected to help their program operators forge local partnerships that will enhance programs and encourage specific projects. Partnerships include those with business, education, labor, economic development, employment service, vocational rehabilitation, minority affairs, and community based organizations.
8. Members are expected to contact state and federal legislators to provide information on JTPA issues and the specific impact of legislation.
9. Members are expected to understand the quarterly treasurer's report, including source of funds, contracting process, and liabilities.
10. Business members are encouraged to use the JTPA services of their local program operator in their business.
11. Members are expected to visit their local program sites occasionally throughout the year.
12. Members are expected to recruit new members to the PIC and Board of Directors.
13. Members are expected to participate in the semi-annual review and selection of program operators within their districts.
14. Members are expected to give feedback when leaving the PIC or Board.

#### **MEMBERS MAY EXPECT THE FOLLOWING SUPPORT FROM ADMINISTRATIVE STAFF:**

1. Members may expect staff to provide a one-day orientation session to the organization.
2. Members may expect staff to provide a regular narrative from the Executive Director with updates on issues of importance.
3. Members may expect staff to provide agenda packets for quarterly meetings two weeks prior to meetings.
4. Members may expect staff to be available to answer questions on issues.
5. Members may expect staff to be available for support functions, such as speech writing or information preparation, for JTPA-related projects.
6. Members may expect staff to distribute press releases on their election to the PIC, election as an officer, and other relevant activities.





## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

7. Members may expect staff to contact them when their assistance is needed on legislative, policy or other matters.
8. Members may expect to receive various program publications.
9. Members may expect staff to set up hotel and meeting arrangements and reimburse them for covered expenses incurred by members.
10. Members may expect staff to audit the program and alert PIC members to potential liabilities.
11. Members may expect staff to carry out the directions of the PIC.

#### CONTACT:



The Oregon Consortium and The Oregon Private Industry Council, Inc.  
260 SW Ferry, Suite 102  
Albany, OR 97321  
(503) 928-0241

## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**      **Restatement of Code of Regulations for the Private Industry Council**

**PROGRAM:**      Toledo Area Private Industry Council  
Toledo, Ohio

**DETAILS:**      This six-panel brochure contains detailed information regarding service for the PIC. The following sections are included: Name, Statement of Purpose, Rules of Order, Members (membership requirements and expectations), Trustees, Officers, Removal of Trustees or Officers, Resignation, Statutory Agent, Executive Committee, Committees Amendment, Fiscal Year, Elections, Indemnity, Neutrality, Transactions between Toledo Area Private Industry Council and its Trustees and Officers.

**CONTACT:**      Toledo Area Private Industry Council, Inc.  
331 14th Street  
Toledo, OH 43624  
(419) 244-3900



## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Serving women, dropouts and welfare recipients**

**ORGANIZATION:** Panhandle Area Council (PAC)  
Hayden, Idaho

**CHALLENGE:** To restructure the program to save staff time and provide more quality services to targeted participants, including females, dropouts and welfare recipients

**DETAILS:** The PAC staff wanted to create an environment that was fun, creative, positive and provided incentives and trust for their clients and co-workers. As a result, the staff developed a referral contest and prizes monthly at the Department of Health and Welfare for case managers, incentive awards for small successes of participants and other methods of rewards. Evaluations have been wonderful from the participants. The program has been highly recommended in the local judicial, welfare, state industrial and social security systems.

**CONTACT:** Panhandle Area Council  
11100 Airport Drive  
Hayden, ID 83835-9743  
(208) 772-0584



## MARKETING PLAN

### WORKING EXAMPLES TO CONSIDER

- EXAMPLE:** **A brochure that answers many JTPA questions**
- ORGANIZATION:** Central Oklahoma Private Industry Council  
Oklahoma City, Oklahoma
- CHALLENGE:** The Central Oklahoma Private Industry Council wanted Oklahoma City to know that they were a public-private cooperative partnership working to make a real difference. They wanted to reach out to the community in Central Oklahoma and recruit the JTPA eligible population.
- DETAILS:** Creative staff of the Central Oklahoma Private Industry Council designed an informative newspaper supplement prepared especially for citizens of Central Oklahoma. The brochure lists: questions such as "Who are we and how can we help You?"; services provided; addresses/phone numbers of JTPA Employment and Training Program Offices; and other general program information. Also included are two program participant success stories, and a listing of the Private Industry Council members. The brochure was used as a newspaper supplement and placed in human service offices throughout Oklahoma City. Samples of "Who Can Help Me Get a Job That's Got a Future" are available upon request.
- RESULTS:** Last year 4,289 adults and young people were helped by JTPA programs. Over a third secured good jobs and are now productive employees, drawing a regular paycheck and very proud of their accomplishments.
- CONTACT:** Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102  
(405) 297-2940



## **CITATIONS FOR MARKETING**

### **CLASSIFICATION OF COSTS**

20 CFR 627.440(d)(3). Training-related and Support Services - Title II-A. Costs for training and supportive services that may be charged to the Title II-A program are:

(i) The personnel and non-personnel costs directly related to providing outreach, intake, and eligibility services. . .

20 CFR 627.440(d)(4). Training-related and Support Services - Title II-C. Costs for training-related and supportive services that may be charged to the Title II-C program are the costs identified in paragraph (d)(3) of this section. . .

20 CFR 627.440(d)(5). Administration.

(E) Providing State and local officials and the general public with information about the program (public relations);

20 CFR 627.440(e). Other cost classification guidance. (1) Personnel and related non-personnel costs of the recipient's or subrecipient's staff, including project directors, that perform services or activities that benefit two or more of the cost objectives/categories identified in this section may be allocated to the benefitting cost objectives/categories based on documented distribution of actual time worked and related costs.

### **NON-DISCRIMINATION AND EQUAL OPPORTUNITY RULES**

29 CFR 34.6(a). Recipients shall take appropriate steps to ensure that communication with beneficiaries, applicants, eligible applicants . . . and members of the public with disabilities, are as effective as communications with others.

29 CFR 34.23(b)(1). In recruitment brochures and other materials which are ordinarily distributed to the public to describe programs funded under JTPA or the requirements for participation by recipients and participants, recipients shall indicate that the JTPA-funded program or activity in question is an "equal opportunity employer/program" and that "auxiliary aids and services are available upon request to individuals with disabilities." Where such materials indicate that the recipient may be reached by telephone, the materials shall state the telephone number of the TDD or relay service used by the recipient, as required by § 34.6.

29 CFR 34.23(d). A significant number or proportion of the population eligible to be served or likely to be directly affected ... may need service or information in a language other than English in order that they be effectively informed of or able to participate in the JTPA-funded program or activity. In such circumstances, the recipient shall take reasonable steps . . . to provide to such persons, in appropriate languages, the information needed; ....



## **M A R K E T I N G   P L A N**

29 CFR 34.23(e). As provided in § 34.6, the recipient shall take appropriate steps to ensure that communication with individuals with disabilities are as effective as communications with others.

### **HIGHLIGHTS OF COMMENTS SECTION OF INTERIM FINAL REGULATIONS**

Section 627.440(d) defines the three Title II cost categories. Several commenters raised questions about the applicability of cost categories and cost limitations to incentive funds received by an SDA. Section 627.440(c)(2) specifies that the cost categories and cost limitations are not applicable to such funds. Many comments were received on the classification of the costs of outreach, intake, eligibility determination and related activities. Paragraph (d)(3) specifically includes these costs in the training-related and supportive services category. The intent of this provision is to allow costs incurred on behalf of an individual prior to becoming (or not becoming) a participant to be charged to the training-related and supportive services category.

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O U T R E A C H



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 **INTRODUCTION TO OUTREACH**

The preceding chapter offered you important suggestions for developing marketing plans which encourage systematic planning for all of your public relations, outreach, and recruitment activities and how those strategies can complement each other to achieve your targeting goals. This chapter will focus more directly on the particular elements of an effective outreach program — from building relationships with important organizations in your community, to what needs to be communicated and the strategies needed to get there.

We recognize that the JTPA system has come a long way in its understanding of the significance of outreach. In developing this chapter, we relied upon the many SDAs who are already actively engaged in outreach activities, and we will share with you their experiences as well as profiling many different strategies that are available to you in developing or expanding your outreach program. We also offer suggestions on the day-to-day management of outreach activities.

The new JTPA Amendments underscore the importance of an aggressive outreach program — the most important link between your targeting goals and your recruitment strategies. Ultimately, you will know when you have an effective Outreach program — for it creates very positive momentum for your SDA — where individuals want to sign up for your programs and both public and private organizations want to become your partners — helping to achieve your organization's targeting goals.





## ► DEFINITION OF OUTREACH

*Outreach is the initial program operations function which establishes a positive foundation for recruitment. Outreach develops an awareness of the JTPA program and its services through communications and linkages with individuals, community groups made up of potentially eligible individuals and organizations which serve the targeted eligible population.*

Outreach services are described as those services which make individuals aware, develop awareness and encourage participation in employment and training programs.

Outreach is classified as an administrative or a training-related and supportive service cost in 20 CFR 627.440 which authorizes personnel costs directly related to providing outreach and cost of component supervisors and/or coordinators as well as clerical staff, provided such staff work on such services. If the staff is not full time then actual allocations of time and related costs are to be made as allowable charges.

SDAs should note that when information is provided to state and federal legislators, local elected officials, and the general public about their program, it is considered an administrative function.

SDAs need to be cautious not to confuse job title with job function. It is impossible to specify the treatment of every conceivable item of cost. SDAs must apply the basic principle of costs being charged to the cost category in accordance with the benefits received. It is important to note that in 20 CFR 627.440 allowable costs are to be charged or allocated to cost objectives/categories to the extent that the benefits are received by the objective/category. The SDAs should be cautious in the outreach area not to confuse it with public relations as outreach activities are chargeable to the training related and support service category while all public relations is an administrative cost. Examples of the different costs are referenced on pages 125-126.



## ► PURPOSE AND INTENT OF OUTREACH

Outreach is that critical communications link between your SDA and the individuals and organizations in your community who have the greatest potential for helping your SDA achieve its targeting goals. If done effectively, outreach creates a positive climate in which you conduct your JTPA programs and services. And, it lays the foundation for conducting effective recruitment.

The goal for your outreach program should be to create a clear vision in the minds of your audiences as to who you are and what kinds of programs and services you offer, who the potentially eligible are and the significant contributions your SDA is making to help individuals gain the training and skills they need to make that important transition to full-time employment.

We now have a mandate through the JTPA Amendments to fully develop an outreach program. The Amendments call for expanding the awareness of JTPA programs and services, establishing linkages with programs and organizations to assist in the referral of applicants to appropriate education and training services and developing appropriate interagency agreements. The Citations section of this chapter lists the appropriate JTPA references.

Since outreach is that important first step in responding to this new agenda, the challenge now is for each SDA and Private Industry Council to develop an effective outreach program. Each SDA should design their outreach program based on this new JTPA agenda as well as include goals pertinent to their local community. Here are some suggestions for outreach goals you may want to include in your marketing plan:

---

### OUTREACH GOALS

- To create a positive awareness among the potentially eligible population of your program and services.
- To connect with key organizations and associations critical to the success of the mission of your SDA and to reaching your targeting goals.
- To establish two-way communications systems that encourage organizations and programs to refer participants to your programs and services and allow you to refer eligible applicants to their programs and services.
- To create a foundation for the development of appropriate inter-agency agreements.
- To directly enhance your recruitment efforts.
- To more effectively use JTPA financial resources.

## O U T R E A C H

Your outreach goals should become an integral part of your marketing plan discussed in the previous chapter. Once you have determined those goals, you have many options to consider when planning your outreach activities. They range from communication activities where you can easily control your message such as brochures and pamphlets to activities where you are not always in control of what is being said about your SDA — for example, press interviews or press coverage about a particular event. Some strategies also give you much more expansive coverage while other techniques require a much more targeted and staff-intensive approach. Whatever option you select, all communications need to reinforce, either directly or indirectly, the development of the awareness of your program and services among the potentially eligible individuals and within the organizations who serve them.

We now have a decade of experience that shows what can happen when we don't effectively communicate about our programs and services — limited awareness; confusion over program goals and responsibilities; negative publicity; and, perhaps most importantly, instances where the JTPA program has not always achieved its ultimate potential.



## ► METHODS AND TECHNIQUES FOR OUTREACH

In the employment and training business, we often remind our participants about the importance of first impressions in a job interview. The same holds true when introducing your SDA to a new audience — whether it is the manner in which staff respond to general requests for information by way of the telephone, or in prepared presentations and written materials.

As part of this “first impression,” it is also important to determine upfront what and how you want to communicate so that your audience has a clear understanding of your SDA’s programs and services.

*First*, communicate what your community organizations and employers want to know. What are your programs and services? How will these help me? What will I gain from participating? Therefore, the benefits of participating in your program should be the first information communicated.

*Second*, communicate about the *specific* services your SDA provides, not *what* it is. It is helpful to create a clear vision in the minds of your audience as to *how* your programs and services work.

*Third*, communicate a sense of confidence about the quality of your SDA and its services and illustrate that your JTPA program has integrity and credibility. Most people require some form of endorsement from some level of authority before they accept what you have told them as being credible. Highlight the professionalism of your organization, your program’s track record and provide examples of your successes.

As you can see, there are many ways to advantageously position your SDA for outreach. As discussed in a previous chapter, your mission statement — which incorporates those goals — is the foundation for how you communicate about your SDA. Ultimately your outreach program is seeking to promote a consistent and professional image, which in turn, helps create the climate where individuals and organizations are aware of your programs and services.

## MAKING THE OUTREACH CONNECTIONS

In every community there are scores of organizations that can be helpful to your SDA and your outreach program, from educational institutions, to community organizations, to the news media. Depending upon your needs — whether they are to secure the active participation of a particular organization or simply to make yourself known to an organization so they can make occasional referrals — your outreach program is the first step in making that connection.

Sec. 265 (a) and (b) of the Act requires establishment of education and training program linkages. Section 265 (c) suggests several more. Many of the programs and agencies mentioned serve some or all of JTPA's target groups and will form the foundation for an active outreach system. Of course, outreach (expanding awareness) is only one of many reasons for coordinating.

Here's a basic checklist of organizations which may be appropriate. Also, for names of specific organizations in your local community, you may want to check with your local Chamber of Commerce or United Way. Or for additional ideas, check the Human Service Guide of your Telephone Directory, often referred to as the "Blue Pages." Remember to also refer back to the lists in the Targeting Chapter.

Given the potentially large numbers of organizations in your community, it will be important to carefully evaluate upfront which organizations require more intensive and/or individualized outreach strategies and which will be marginally helpful and, therefore, require only a distant or secondary outreach strategy. For example, a neighborhood recreation center may have

### OUTREACH ORGANIZATIONS

- Public education system
- Community Colleges
- State welfare agencies
- Employment Service
- Community-based organizations
- Tenant (public housing) Councils
- Housing referral agencies
- Health departments
- United Way agencies
- Local Court (Justice) system
- Child care agencies
- Local churches
- Neighborhood Improvement Associations
- Local recreation centers
- Women's organizations
- News media



limited staff and, therefore, sending a poster describing your programs and listing your telephone number may be sufficient. On the other hand, a district health center may be regularly counseling their participants and, therefore, the counseling staff may greatly benefit from a thorough understanding of your programs and services.

To stimulate greater understanding between organizations in the Reading, Pennsylvania, community, Berks County Employment & Training encourages SDA staff to actively participate in community programs and serve on boards of directors.



**IDEA...**  
**FOR USING**  
**DIRECT MAIL**  
**TO**  
**COMMUNICATE**  
**WITH SCHOOLS**

For other organizations, a direct mail campaign may be sufficient, followed by periodic communications — perhaps through quarterly status reports or newsletters. For example, direct mail letters can be sent to agencies and schools who may be able to directly refer eligible individuals. Here is a letter sent by the Albuquerque/Bernalillo County PIC's Career Services for Persons with Disabilities to area schools regarding program enrollment.

*Dear — ,*

*Career Services is in the process of gearing up for its 1992 Summer Transition program. This year we are beginning the process a little earlier than in the past in order to facilitate a smoother transition of those students referred by the Albuquerque Public Schools.*

*The program is open to all special education graduating seniors. A brief description of the program and services offered by Career Services is attached.*

*We would like the opportunity to come to your school and discuss our program, referral and intake process, etc. with all special education teachers and vocational evaluators who would be making referrals to the program. We are trying to schedule these meetings during the month of February on either Wednesdays or Fridays. We would appreciate hearing from you as soon as possible so that we can begin scheduling times at various schools.*

*If you have any questions or if we can be of assistance in any way, please do not hesitate to call.*

*Sincerely,*

*Ronnie Schroer*  
*Job Developer*

*Linda Woods*  
*Job Coach*

*Benjamin Yerxa*  
*Employment Specialist*



Albuquerque/Bernalillo County Private Industry Council  
1701 Fourth Street SW  
Albuquerque, NM 87102  
(505) 768-2861



**IDEA...**

**FOR  
COMMUNICATING  
WITH  
COMMUNITY  
ORGANIZATIONS**

One particularly helpful way the Private Industry Council of Lake County in Illinois keeps in touch with their community organizations is by publishing a comprehensive human services guide known in the community as the "Red Book." Now in its 10th year, the guide profiles hundreds of community and municipal resources — from a description of their JTPA program — to a listing of child care agencies.



Private Industry Council of Lake County  
415 West Washington Street  
Waukegan, IL 60085  
(708) 249-2200

Connecticut. The directory lists where youth can go for services such as Teen Parenting, Education, Jobs and Careers, Sex and Pregnancy Counseling, and Mentoring.



Private Industry Council of Southern  
Connecticut, Inc.  
181 Middle Street  
Bridgeport, CT 06604  
(203) 576-7030

*Where to Look in "Yo Bridgeport"* is a directory of Youth Services published in a "hip-pocket" style by the Private Industry Council in Bridgeport,



**IDEA...**

**FOR A  
YOUTH SERVICES  
DIRECTORY**

## ***BUILDING AND ENHANCING PARTNERSHIPS***



### **NOTES**

There is no adequate substitute for "upfront and live" personal communication when seeking to build partnerships with organizations important to your targeting efforts. To get started, you may want to host group sessions — such as breakfast meetings or open houses at your SDA's offices or at training locations where you can personally communicate information about your programs and services to a group of organizations.

In planning group meetings, you should consider including program participants on your agenda, who can help explain the value of your programs and services to potential organizations. As much visual reinforcement as is possible should also be provided — from slide shows and videos which are discussed in more detail later on in this chapter, to brochures which contain photographs and brief descriptions of your training programs.

One SDA takes photographs of its participants during training and then has the photographs blown up and placed on easels around the room during introductory-type presentations. The photographs usually become the "ice breaker" for casual conversation as well as creating visual support for the speakers.

In some instances, it will be advantageous for your SDA to develop a more comprehensive plan for those organizations with which you wish to establish an on-going relationship — particularly those organizations from which you need referrals and those to which you would like to refer potential applicants as part of the coordination requirements under JTPA. Once you identify agencies to work together with at the system or service delivery level, there should also be agreement on whether the linkage will be primarily cooperative or collaborative in nature. *Memorandums of Understanding* can be used to capture the intent and provide a framework for concerted action. Cooperative arrangements might include co-locating services, making referrals between agencies, and cross-training staff. Collaborative arrangements might include strategies that focus on making fundamental changes in the way services are designed and delivered throughout the system. Communities are likely to experience progress when agreements have been carefully crafted to include action areas.

## TECHNIQUES FOR BUILDING AND SUSTAINING OUTREACH PARTNERSHIPS

- ▶ Identify participants of common concern.
- ▶ Establish a shared vision and mission.
- ▶ Identify expectations.
- ▶ Establish a written plan and timeline for specific, agreed upon activities and the staff assigned to carry out the assignments.
- ▶ Involve top management from the beginning of the relationship — such as PIC members or the LEO, if appropriate — and provide periodic updates as the partnership progresses.
- ▶ Communicate with each other on a regular basis.

You probably are already working with a significant number of organizations in your community. If you are looking to strengthen the relationship, it may be helpful to conduct a brief assessment — to “check out” how well the partnership is working. How are you presently communicating (verbally and in writing)? What’s being said? Is the communication occurring at appropriate levels within each of your respective organizations? Does the communication reflect your outreach goals? This kind of a “check-up” can often lead to an enhanced partnership and help meet your linkage and communication needs.



**IDEA...**

**FOR TRAINING  
SESSIONS FOR  
PARTNERS**



In San Diego, the Private Industry Council frequently sponsors training sessions for their service providers and community organizations. This keeps their partners updated on regulations, contracting requirements and issues related to improving their training and supportive services.

San Diego Consortium & Private Industry Council  
1551 Fourth Avenue, Suite 600  
San Diego, CA 92101  
(619) 238-1445

And finally, on-going communication is essential. It reinforces the importance of the partnership and underscores your outreach goals.

## ***SECURING LOCAL ELECTED OFFICIAL AND PIC PARTICIPATION IN YOUR OUTREACH PROGRAM***

When designing your outreach strategies, it is most appropriate to include your Mayor, Local Elected Officials, and your Private Industry Council. As the JTPA law set forth, the PIC and LEO are the leaders in your community responsible for JTPA issues — and they are your two most powerful assets when communicating about your programs and services. For the audience, their participation validates your program and communicates that your organization and its work is important to the community. Therefore, as often as possible, they should be at the forefront of your outreach strategies. In Philadelphia, the Mayor and PIC Chair serve as Co-Chairs of the Summer Youth program, communicating the importance of that program to both the employer community as well as to the general public. The joint chairmanship is very effective in gaining broad-based exposure for the program both with the business media and the general news media. And these outreach activities lay the foundation for obtaining job commitments from the private sector, fundraising efforts from foundations and businesses, and encouraging youth to sign up for the program. In turn, the Mayor and the PIC Chair receive recognition for their involvement in a program that is making an important contribution to their city.

Also, since the Private Industry Council often reflects the diverse constituencies in your community that you are seeking to target — education, community-based organizations, other federal and state programs — they may have important knowledge and recommendations on how best to communicate to particular organizations.



**IDEA...**

**FOR A  
COMMUNITY  
EFFORT TO  
STUDY  
WORKFORCE  
ISSUES**

The City of Baltimore's Private Industry Council has developed an aggressive outreach program known as "Jobs for Tomorrow" to examine critical workforce issues. The PIC's work centers on:

- 1) identifying the issues
- 2) convening key organizations to study the issue and develop solutions
- 3) acting as a catalyst to encourage the implementation of an action plan

To date, the PIC is engaged in investigating four industrial labor market areas as well as convening workgroups around mid-school and male youth-related issues.



Office of Employment Development  
417 East Fayette Street, Suite 468  
Baltimore, MD 21202  
(410) 396-1910



## O U T R E A C H

When asking PIC members or local elected officials to participate in your outreach program — make sure they feel confident about their outreach role. While PIC members are usually well-versed about the JTPA program in general, they may require more intensive briefings to gain the comfort level they need to participate. It might be helpful to develop an ongoing communications system — sending articles of interest, profiles of particular programs that may relate well to your outreach goals and, in general, keeping them well-informed.



## ***BUILDING A MEDIA PARTNERSHIP***

The news media and your SDA share a common agenda. The news media has a need to communicate information of value to its audience, and SDAs have programs and services that are of value to a significant portion of the news media's audience. Furthermore, the Federal Communications Commission (FCC) requires that television and radio stations conduct community service programming. This common agenda opens the door for SDAs and PICs to create exciting and interesting partnerships with radio and television stations and newspapers. There are several approaches you might want to consider.

### **EDITORIAL BOARD MEETINGS/OP-EDITORIALS**

Editorial boards of newspapers are composed of the executive editor and several editorial writers. They are usually willing to meet, no more than once a year, with high-level officials to discuss issues of critical concern to the community. The purpose of the meeting is not to secure press coverage, but to inform the editorial board members on particular issues. It is very appropriate for the PIC or SDA to meet with an editorial board to inform them about JTPA and other employment and training issues in their community. Editorial boards are even more interested when there has been a significant legislative change or there is a "hot" community issue. The advantage to organizing an editorial board meeting is that once the editorial staff is familiar with your organization and the relevant employment and training issues in their community, they may begin contacting you (and even reference your organization and programs in their editorials) for further information.

To organize an editorial board meeting, ask your PIC Chair or LEO to send a letter to the executive editor requesting the meeting. The letter should clearly indicate the purpose of the meeting and a brief outline of the issues you want to cover. Editors are usually willing to accommodate 5-6 people in this type of meeting, so in addition to the SDA Director, PIC Chair and LEO, you can usually ask several other members of your PIC as well.

Occasionally you can also submit an article as an op-editorial. Op-editorials are usually submitted by an individual who is an authority on a particular topic. For example, your Mayor might want to submit an article on the value of bringing together all of the city departments to offer a more coordinated approach to delivering employment related services in the community. The articles should be on an issue of current interest to the broader community.

### **PROGRAM CO-SPONSORSHIP**

A second approach is to review the demographics of the audiences for each of the television and radio stations. You can get that information directly from the station, Arbitron, A. C. Nielsen Company, or your public library. Analyze that information and determine how the goals of your outreach strategy correspond to their audience. For example, if you are looking to outreach to older individuals, then an all-news radio station may be a good media partner. On the other hand, younger audiences usually listen to contemporary radio stations.

The value of suggesting to a particular station that you want to create a partnership is that it suggests a long term relationship. Before approaching a station, develop a plan that identifies what you would like from a partnership and recommend a series of ways that you could work together; i.e., endorsement of a particular program, local disc jockeys appearing at special events or a series of announcer sponsored public service ads. Then package your presentation so that it looks like a complete program. Include in this package ways that you think your organization can be helpful to the station as well.

Even though you are offering them an opportunity to participate in a program that responds to their community service requirements, lots of organizations can meet that requirement. They will want to work with your organization if you offer them additional incentives that help them respond to their own organization's goals. You may want to give them exclusive title as a "co-sponsor," or have the mayor or local elected official recognize their participation in a special event, or promise to include their participation in news releases and include their work in your upcoming annual event. Gaining recognition as a leader in the community has significant value to a station.



## **IDEA...**

### **FOR A MEDIA PARTNERSHIP FOR SUMMER YOUTH**

In Philadelphia, POWER 99, WUSL-FM, an urban contemporary radio station, has been the media partner for the summer jobs program for several years. Annually, the radio station sponsors a "hot-line" for three months encouraging youth to sign up for the program, with announcements running three or four times a day. In turn, the Philadelphia PIC prints POWER 99's logo on all of their pre-registration cards, posters and brochures and recognizes POWER 99's contribution at their annual employer kick-off event and in a recent citation delivered by the Mayor. The result of this partnership is that the announcement generates approximately 7,000 calls each Spring to the hot-line and has proven to be the most effective recruitment strategy for out-of-school youth.



The Private Industry Council of Philadelphia, Inc.  
3 Park Way, Suite 501  
Philadelphia, PA 19102  
(215) 963-2100

## WORKING WITH THE NEWS MEDIA

It is important to consider using newspapers, television and radio for your outreach activities. Here's how positive media coverage can help your outreach program:

- ▶ Builds awareness of your programs and services to the targeted populations — including that audience you missed through your other targeted approaches; i.e., direct mail or invitation to special events.
- ▶ Communicates your programs and services to a broad targeted audience.
- ▶ Creates a positive visual image in the minds of the potentially eligible population of your programs and services.
- ▶ In-depth newspaper articles, in particular, allow you to communicate the “complete story” more effectively than in a typical brochure.
- ▶ Produces a sense of momentum for your organization. If your partners frequently see positive press coverage about your organization, it then creates the atmosphere that this is an organization they want to work with.

It is particularly important when working with the news media that you build good relationships. Good media relations are an asset and while you will never be able to control what the news media says about your organization, the better the relationship, the more likely it is that you will receive favorable news coverage. A good relationship is built on trust and respect.

### *Some tips on working with the news media:*

▶ *Always give accurate information.*

If you don't know the answer to one of their questions, tell the reporter you will get back to them.

▶ *Respond as quickly as possible to a reporter's call.*

They are often on deadline and need information quickly. If they are calling on an issue that you are not ready to discuss, have a spokesperson from your organization return the call and politely explain that you are not available.

▶ *Offer yourself as a resource.*

On an on-going basis, offer to be a resource for information on employment and training related issues — even if they are not doing a story specific to your SDA. Reporters often appreciate knowing that they have a place to call to get background information.

▶ *Assign one person to take all calls from the media.*

This insures that your organization can respond appropriately and quickly.

## NEWSPAPERS

Newspapers report news. They provide their readers with detailed information about current events or particular issues. Readership is generally composed of individuals with higher levels of education and generally are not youth. Minority newspapers are printed in most metropolitan areas for many of the minority communities, e.g., Spanish, African American, Asian.

## ALTERNATE NEWSPAPERS AND PUBLICATIONS

In addition to the major metropolitan newspapers, there are a number of other publications that are available and can communicate the services your program has to offer. Consider these types of publications:

- ▶ community and neighborhood newspapers,
- ▶ ethnic newspapers,
- ▶ church bulletins, newspapers and newsletters,
- ▶ bargain shoppers, such as the "Penny Pincher," the "Bargain Mart," and the "Thrifty Nickel"—all publications that are offered free or at a nominal cost, usually available at convenience stores,
- ▶ service agency publications such as newsletters and newspapers,
- ▶ your own newsletter or publication.

Many PICs have developed their own publications to make others in the community aware of the services being offered, and they often contain outreach messages.



**IDEA...**

**FOR A  
NEWSLETTER**

*Success*, a newsletter published by the Private Industry Council of Lake County, offers articles on award breakfasts, new PIC services, and other news articles.

In their Fall 1992 issue, while discussing the results of their recent summer youth program, they encouraged those with questions for next year's program to call for more information. They also announced their efforts to better serve area workers who are age 55 or over.



Private Industry Council of Lake County  
415 West Washington Street  
Waukegan, IL 60085  
(708) 249-2200

In most rural areas, a larger city newspaper is usually available, but a local weekly is usually printed for local consumption. These local newspapers are always looking for print and generally will cooperate with local programs and services to print stories at no cost.





## TELEVISION

Television is primarily a form of entertainment. News coverage is generally limited to only the essential facts, but because it is visual it easily communicates its message. Its audience is diverse, depending on the programming. Stations or channels which target youth or other special population groups would be excellent for outreach efforts. There are also cable stations that may penetrate target groups, such as MTV (youth), BET (minorities), and foreign language stations (minorities), as well as stations with exclusively local programming and some that are operated by local government.

## RADIO

Radio is also primarily a form of entertainment. Unless it is an all-news radio format, news coverage is even more limited. Format and type of music dictates the profile of its audience. Radio stations both AM and FM have a clear profile of the audience they intend to reach. By knowing and understanding the audience profile of the various radio stations, you can control your message and directly target a specific audience. You may not have control over the listening audience, but you can exercise some control over the type of stations broadcasting your message.



**IDEA...**

**FOR  
RECRUITING  
AT-RISK  
YOUTH**

The Cuyahoga County Department of Employment Services also uses press releases and media advisories to provide information about their Youth Entrepreneurship Success Strategy (YESS) program, targeting at-risk high school students ages 14 — 18. By providing information about the program to the media, excellent coverage was generated by television, radio and daily and weekly newspapers. They believe that the positive coverage generated participant interest and increased involvement of community agencies.

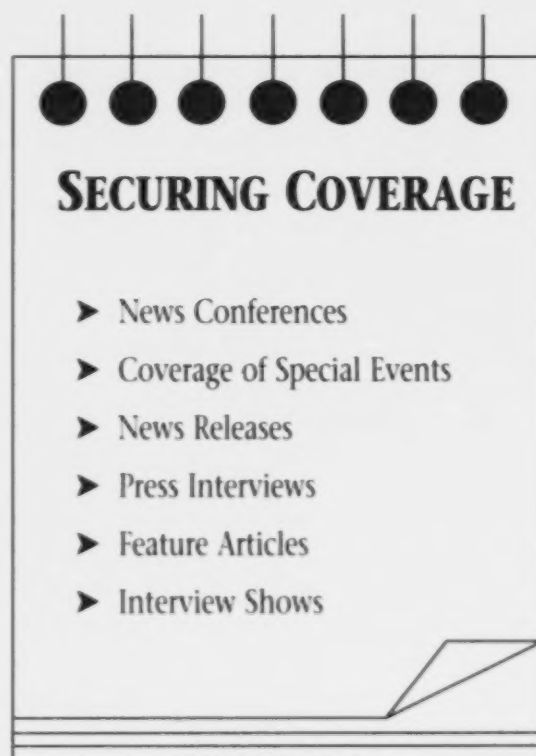


Cuyahoga County Department of Employment Services  
Division of Employment and Training, SDA 21  
1641 Payne Avenue, Room 330  
Cleveland, OH 44114  
(216) 987-8503

## SECURING MEDIA COVERAGE

Editors are always looking for information important to their audience. You can generally classify the coverage as either hard news, human interest, feature articles, or interviews. When editors make a decision on covering a story, they are evaluating it to determine how newsworthy it is. Is it of interest to a broad audience? Who's involved in the story? How well-known is the organization? Is the story unusual? Is the story connected to an issue that has been in the news recently?

Since jobs and our economy are in the news frequently, that increases the likelihood of securing coverage for your JTPA program. There are several ways to secure coverage.



### NEWS CONFERENCES

This format is effective when you have an important announcement, such as your SDA's receipt of a major new contract to initiate a community-wide project. You will be more likely to gain widespread coverage for the news conference if you have a prominent individual as spokesperson, such as your Local Elected Official, Mayor, State Secretary of Labor, or PIC Chair.

Since some stations have news teams permanently assigned to cover the Governor and/or the Mayor, there is a reasonably good chance that if either dignitary is part of your event, those same news teams will cover your event.

Schedule your news conference carefully. If there are other events, or if it is a heavy news day and your information is not "hot" news, you run the risk of few reporters at your press conference. You can increase your chances of good attendance if:

- The press conference is scheduled in the morning.
- It is scheduled on a day (usually mid-week) when the television and radio stations schedule more reporters.
- The press conference includes someone prominent like the Governor, State Secretary of Labor or the Mayor.

### **MAKING THE NEWS CONFERENCE A SUCCESS**

- One or two days before the news conference, send or fax, an "invitation to cover" with a very brief description of the purpose of the news conference, who will be in attendance, location of the news conference and date and time. In your description, provide only the minimum information the news media needs to make the decision to cover the event, or there will be no reason for them to send a reporter.
- Locate the news conference in a targeted neighborhood.
- Send special invitations to partner organizations.
- The day of the news conference, call the news editors (newspapers and radio) and assignment editors (television) reminding them of the conference.
- Ask if they have any electronic needs such as multiplexer boxes, wall outlets or telephones.
- Hold the news conference in a room large enough for crews and lights. You will need a podium and microphone so that there is one visible, central location where the announcement will be made. Make sure there is a place to hook the microphone into if multiplexer boxes are not being used.
- Provide the reporters with a press kit that includes: written text (news release) of the critical issues to be covered in the news conference; brief biographies of any prominent speakers; profile of your SDA and its mission; profile of any other partner organizations; and any other facts pertinent to the topic.
- Make arrangements for the speaker or executive director to be available for a post-interview with reporters wishing to do a more in-depth story. Also provide the name and telephone number of one contact person in your SDA so that the reporters can get answers they need when preparing their story. And, make sure the contact person will be in the office the rest of the day to take calls.
- Fax or mail out your press release to those stations and newspaper who do not attend. If you took photographs, offer to send them a photo. If it is a daily publication, this usually requires that your photographer give you quick turn around (within 24 hours). Local newspapers generally can wait several days (depending on their production schedule).

## COVERAGE OF SPECIAL EVENTS

Special events are an excellent way to secure news coverage. They create a visual opportunity for the news media — and often focus on the achievements of individuals or organizations.

Many of the press suggestions outlined above are appropriate for special events as well. However, in announcing a special event, you can invite the press several weeks in advance. Since the press receive scores of invitations to attend similar events, one strategy to gain their attention is to develop a creative invitation.

For example, when an SDA was announcing their new youth service corps program, their invitation included a miniature plastic sample of a construction tool — to denote the community service aspect of their program.

### MAXIMIZING COVERAGE AT YOUR EVENTS

- ▶ Make reminder calls to the press, requesting their coverage, the day before the event.
- ▶ Review with the press in advance any special needs they might have depending on what activities are taking place, particularly if the event is outdoors or if there are several activities taking place simultaneously.
- ▶ If the event is a luncheon or dinner, set aside a table for the press that is near the front of the room to insure that they have a good view and can easily hear the speeches.
- ▶ Alert the press in advance if there is a specific schedule for any particular events or speakers.
- ▶ If recognition is to be given to JTPA participants or to community organizations for their participation in your program, provide the press (in advance) with a profile of the individuals and organizations. You can offer to set up interviews in advance as well. This helps create a more in-depth feature type story and helps the reporter make the event more interesting to cover.
- ▶ Provide a press kit that includes written text of the purpose of the event, copy of speeches, if available, brief biographies of any prominent speakers; profile of your SDA and its mission; profile of any organizations or individuals to be recognized at the event; and any other facts pertinent to the event.
- ▶ Many community newspapers do not have adequate staff to send out on location to events. Call the editor and make arrangements to send them a press release of the event, written in a style similar to how it will appear in their newspaper. Often community papers appreciate photographs and, when possible, customize the information, informing them of any organizations, JTPA participants or prominent speakers that reside in their community.
- ▶ When following up after the event, send the reporters a thank you note for attending.



## NEWS RELEASES

You can mail or fax news releases to newspaper and radio station news editors. But to secure adequate coverage, it is important that the news releases are well written, have complete information and are usually no longer than two or three pages. Editors receive many more releases than they generally can read, so it is critical that they get the "need-to-know" information in the first paragraph.

- ▶ **First**, the headline must grab the editor's attention and encourage the editor to read on.
- ▶ **Second**, who, what, why, when, where and how are the questions that need to be answered in the first paragraph. The balance of the copy in the release should then provide the rest of the details.
- ▶ **Third**, the release date, contact name and telephone number should appear at the top right corner of the first page and the release should be double-spaced.

It's ideal to call the editor to inquire if they received the release, have any questions, and if they would like to send a reporter to your organization for an interview. As mentioned earlier, the more you can tie your news release to current issues that the media is covering, the more you increase your chances for coverage.

Community newspapers are also an important source for increasing awareness of your programs and services. Each community paper operates on a different production schedule and often requires substantial lead time to print a story. Since they rarely have reporters to go out and cover stories, they respond well to news releases and photographs, particularly if you let them know how the story is connected to their particular community.

Another strategy to increase your chances of securing press coverage is to monitor the types of stories different reporters and newspaper generally cover. Some newspapers have an editorial policy (or simply an inclination) to investigate and report on certain issues while others assign reporters to a specific "beat" such as employment, education, business or neighborhood issues. Once you analyze what types of stories reporters or newspapers are inclined to cover, you can then target your news releases to the appropriate paper and reporter.

## PRESS INTERVIEWS

If the news release results in a reporter calling for an interview — or if the press contacts you on their own, here are some tips on how to handle a press interview.

- ▶ ***The reporter is your ally.***

An interview should not be approached as an adversarial experience, it is a dialogue.

- ▶ ***Prepare for the interview.***

Anticipate difficult questions and prepare strong answers. Go into the interview with two or three points that you wish to make — then make them no matter what questions the reporter asks.



► *Remember the audience.*

Also remember your organization's primary audiences. Make sure that your answers respond to their needs.

► *Personalize your answers.*

Wherever possible, cite recent stories that help make your two or three points.

► *Answer questions concisely.*

Speak simply, use everyday words and be pro-active, using active verbs. Turn negative questions around with a positive response.

► *Be friendly, but keep your sense of authority.*

If the reporter interrupts before you are finished, let the reporter finish and then continue your answer.

► *Keep the facts straight.*

When a reporter offers facts and figures, you do not have to unilaterally accept them as factual. Also, don't let incorrect information go unchallenged.

► *Provide the reporter with a press kit.*

Include information about your SDA and any other information appropriate to the interview. For example, if you know that a reporter is interviewing you for a story on non-traditional jobs for women, have your SDA compile appropriate information on any programs you have related to that target population, the programs which have a high percentage of women enrolled, program performance and job placement information and any policy decisions made by your PIC affecting that particular population.

## FEATURE ARTICLES

Feature articles are an excellent way to promote your outreach agenda. Not only do they offer the opportunity of making your programs and services seem more life-like to readers and viewers, but they validate your organization, creating a positive image of your SDA.

The first task is to identify possible story ideas — whether it's an article on how a teenage mother can now enroll in training because of the partnership between your SDA and a nearby child care center or a story about a youth program that just finished painting and fixing up a neighborhood retirement home, making it much more livable for the retirees.

After selecting your stories, promote them to the media. If they have a lot of visual appeal, a television station may be interested. If they call for in-depth coverage, a newspaper feature may be more appropriate.

JTPA operates in an environment where we can share a lot about our participants, many of whom have risen against great odds to change their lives. Sharing human interest stories requires sensitivity to the participants. We must honor the personal side of their lives and share only information they want shared.

One way to make connections for feature-like stories is to keep track of the reporters who write features and see if there is a trend in the type of stories they like to cover. When you identify a reporter who seems a likely candidate for some of your stories, call them and ask for a meeting to brief the reporter on your SDA's programs. During the meeting, inquire as to what types of stories they are most interested in and give them examples of the work your SDA is conducting in that area. Also let the reporter know that you always have feature stories available, so that if they ever need a story, just call!

## **INTERVIEW SHOWS**

Many radio and television stations conduct interview shows as part of their public affairs agenda. Job training is a topic that usually generates significant interest. PIC members, your Local Elected Officials and SDA management staff are all good candidates to be interviewed. It's worthwhile to contact the producer (who sometimes is the public affairs director) and offer to brief him or her on your organization. Position your SDA as the authority on workforce related issues and provide a list of possible talk show topics. And, whenever possible, connect it to a current issue.

For example, if a report was just released showing Congress just authorized an increase in the McKinney program, and you are sponsoring a program that provides training and support services for the homeless, suggest to the producer that this would be an opportune time for an interview.

This gives you the "hook" to get the interview and then you can expand your discussion to other aspects of your outreach activities as well. Offer to provide the producer with a series of questions they could use during the interview. This saves the producer considerable research effort and allows you to guide the interview. Also be prepared when you discuss a particular training program to get telephone calls. Inform your receptionist and counselors so they will be prepared and can refer callers appropriately.

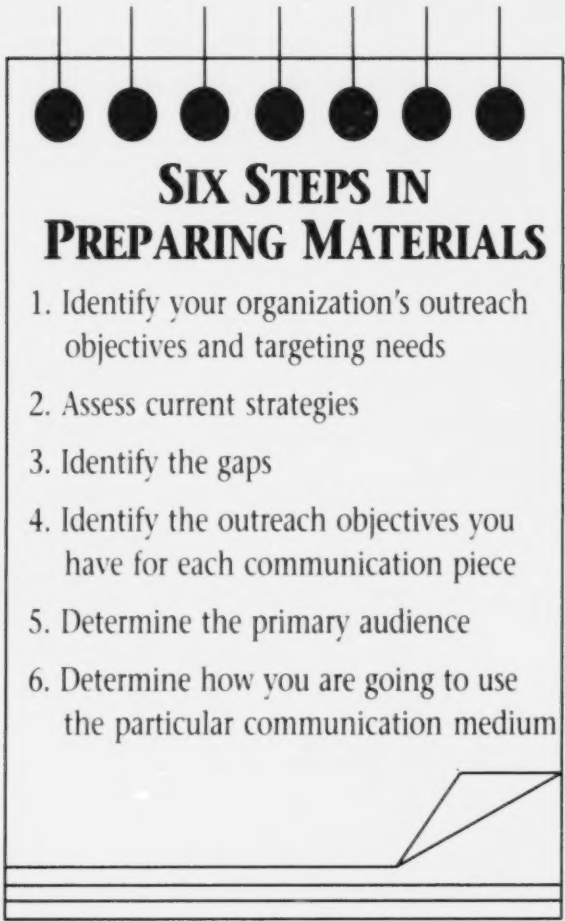
Be sure to keep the producer on your SDA's general mailing list so they will continually be informed of your activities.

## COMMUNICATIONS MATERIALS

In designing communications materials to support your outreach program, the ultimate goal is to positively influence the readers on how they view your SDA and persuade them to become one of your partners; i.e., refer applicants to your programs.

Your outreach materials should reinforce a crisp, professional and positive image of your organization and services. That doesn't necessarily mean four-color, expensive brochures. But it does mean that your communications materials need to make a positive impact — by engaging your readers and visually presenting information in a pleasing way so that your readers want to participate in your program.

Through the use of technology, many states now use computer kiosks to include and disseminate outreach and recruitment messages. These terminals are strategically located in shopping malls, schools, employment offices, libraries, military bases, and remote locations where individuals seeking services and information can have easy access. In addition to information on jobs, many states include messages on training and other services available.



### SIX STEPS IN PREPARING MATERIALS

1. Identify your organization's outreach objectives and targeting needs
2. Assess current strategies
3. Identify the gaps
4. Identify the outreach objectives you have for each communication piece
5. Determine the primary audience
6. Determine how you are going to use the particular communication medium

### BROCHURES, PAMPHLETS AND PRESENTATION PORTFOLIOS

The purpose of a brochure, pamphlet or presentation portfolio is to describe your organization's capabilities and your services and functions. In preparing these materials, there are a series of steps that can be taken which may be helpful in making decisions on what outreach materials you need, how to design those materials and where they fit in your Marketing Plan.

► ***Step 1: Identify your organization's outreach objectives and targeting needs.***

Specifically identify what needs to be accomplished from any written outreach efforts.

► ***Step 2: Assess current strategies.***

Review how you are presently communicating about your programs and services and what materials you are presently using. Assess each communication medium to determine whether it communicates what you want to say about your programs and services and whether it is effectively reaching the audience(s) for which it is intended.

► **Step 3: Identify the gaps.**

Assess the need for new or additional communications materials.

► **Step 4: Identify the outreach objectives you have for each communication piece.**

For example, is it primarily intended to provide a basic profile of your programs and services or are you expecting it to be used for direct recruitment as well?

One SDA uses their brochure for general distribution as well as recruitment. They have included several photographs with a general profile and description, but list on the back flap the 14 training and education programs they generally offer each year.

► **Step 5: Determine the primary audience.**

How and what communication method(s) works best with that particular audience? Is there a particular style that is more appealing? Are there any particular difficulties in communicating with that audience?

In an old-world Christopher Columbus type format, the Central Oklahoma Private Industry Council created a pamphlet entitled "Explore the Wonderful World of JTPA." When you open it up there is a map with subheadings: "Business Adventure...", "Learn to Dream Adventure...", "Re-entry Adventure...", "Learning Adventures..." and "Work Adventure..." with brief descriptions of each program. They also publish the pamphlet in Spanish.



Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102  
(405) 297-2940



**IDEA...**

**FOR A  
PAMPHLET ON  
JTPA SERVICES**

In another SDA that has a growing Hispanic population, they now print their brochures in Spanish and list the three community organizations that have bi-lingual counselors.

► **Step 6: Determine how you are going to use the particular communication medium.**

Is it a direct mailer or are you primarily going to use it as a follow-up to meetings? Will any other materials be used along with it? Does it need to stand alone?

Many SDAs are finding that they need to provide more in-depth information than what is usually described in a typical brochure. The Yuma County (Arizona) Private Industry Corporation, for example, chose a portfolio-style brochure that has a pocket for additional information and a die-cut for business cards. This allows their staff to customize their communications materials based on the presentation and audience.



Yuma County Private Industry  
Council, Inc.  
2725 South Avenue B  
Yuma, AZ 85364  
(602) 344-3778



**IDEA...**

**FOR A  
FLYER**

The Private Industry Council in Des Plaines, Illinois produces a one-page, two-sided flyer, entitled "Meeting Challenges Through Partnerships." The flyer begins with a statement about their PIC's goal, and then gives a brief description of their training programs. This format works particularly well as an insert in a portfolio or as a newspaper supplement.



The Private Industry Council of Northern Cook County  
2604 East Dempster Street, Suite 502  
Des Plaines, IL 60016  
(708) 699-9040

One SDA developed their brochure as a self-mailer. Staff keeps the brochure at their desk so that when anyone calls in looking for information about their SDA, they can immediately mail the brochure as a follow-up to the telephone call.

## PREPARING COPY

The six steps just described should guide you in the preparation of copy for your written pieces. Ultimately, your objective is to gain the attention of the reader, arouse their interest in your programs and services and generate a desire for them to want to participate. Given the importance of communicating the human side of our business, photographs with brief captions are an excellent way to communicate positively about our work. And the less words you use to communicate about your programs and services the better.



**IDEA...**

**FOR A  
CUSTOMIZED  
PRESENTATION  
PORTFOLIO**

## ASSURE A SUCCESSFUL MESSAGE

1. Describe the value of your services
2. Clearly define the services
3. Offer proof that you can deliver the services
4. Instruct on how to access services



► *First, describe the value of your services*

— and why someone would want to participate.



**IDEAS...**

**FOR A**

**VARIETY OF**

**SUCCESSFUL**

**BROCHURES**

The PIC of Louisville & Jefferson County (Kentucky) produced a brochure for their Job Link Centers with the heading: "Your Link to a New Job. And a New Life." The subheadings then go on further to explain the value of participating: "We'll Help you Discover your Skills." "We'll Help you Learn New Skills." "We'll Provide Financial Assistance."



Louisville & Jefferson County Job Training Partnership Agency  
305 West Broadway Street, Suite 600  
Louisville, KY 40202  
(502) 625-2500

"It takes more than technology to succeed... it takes quality talented and skilled people ready to work for you!" is the heading the Wayne County (Michigan) Private Industry County uses on their brochure. Inside they offer two pages of profiles of laid-off employees.



Wayne County Private Industry Council Corporation  
Village Plaza Building  
23400 Michigan Avenue, Suite 400  
Dearborn, MI 48124  
(313) 562-4600

► *Second, clearly define the services.*

The most important thing any reader wants to know is — what will your services do for me? — not what is the service.



The Tarrant County (Texas) PIC entitled their Title III brochure "Challenging ... (with a bicyclist going uphill) That's What Changing Careers *Should* Be"... "Don't take a Detour...Let us help you make the right career choice." The brochure then lists several options: A Job Search Workshop, On-the-Job Training, Vocational School Training and A Support Network.



Tarrant County Employment and Training  
2601 Scott Avenue, Suite 203  
Fort Worth, TX 76103  
(817) 531-5690



## IDEAS...

FOR A  
VARIETY OF  
SUCCESSFUL  
BROCHURES

As a complement to their JOBS' program video, the Philadelphia (Pennsylvania) Private Industry Council produced a brochure, in English and Spanish, entitled "The Right Way to a Good Job!" The brochure's subheadings go on to explain... "What you Need"... "We'll Help you Get"... and "There's Everything to Gain!"...



The Private Industry Council of Philadelphia, Inc.  
3 Park Way, Suite 501  
Philadelphia, PA 19102  
(215) 963-2100

► *Third, offer proof that you can deliver the services.*

For example, provide testimonials of success stories or list the types of jobs that program graduates are now working in. Or, provide statistical information on your program's performance, but translate the JTPA jargon.

"The Stars of Tomorrow" is a brochure published by the Central Oklahoma Private Industry Council that highlights their summer youth program. In a futuristic format, the brochure begins with a brief introduction and program description from the Mayor and then goes on to profile seven program participants. The last two pages list the youth who were on the "Honor Roll of Outstanding Summer Youth as well as a list of the community supporters.



Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102  
(405) 297-2940

► *Fourth, instruct on how to access services.*

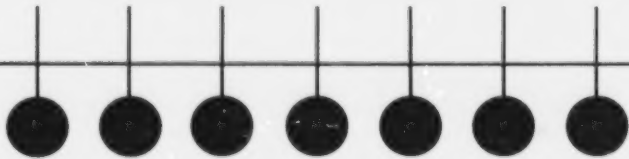
For example, "To refer an applicant for training, call 222-JOBS."



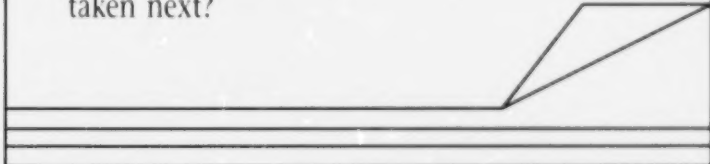
La Cooperativa Campesina de California produced a flyer for their hotline that depicts in cartoon-style a woman encouraging a man to make a telephone call. The flyer promotes the telephone number in large letters as well as a map, showing all of the locations where they offer services.



La Cooperativa  
2101 Capitol Avenue  
Sacramento, CA 95816  
(916) 442-4792



## GUIDELINES FOR WRITING COPY

- Is the written copy simple, direct and easy to understand?
  - Does it communicate how the services are better?
  - Does it create a visual picture in the minds of the reader (through words and/or visuals) of how the services are connected to their needs?
  - Does it answer the question "What's in it for me?"
  - Does it provide persuasive proof?
  - Does it clearly identify what steps need to be taken next?
- 

## NEWSLETTERS

Newsletters can be very useful to your outreach efforts because they are relatively inexpensive to publish and allow you to communicate precise information. If published frequently, they can also help keep your SDA's partner organizations updated on your targeting needs. And finally, they can portray your organization as being dynamic and up-to-date on current issues.

The problem is that many newsletters are never read — and, therefore, careful planning is required to develop an interesting and readable publication. What you want to create through your newsletter is a source of information that has value to your audience — so that they find it worth their investment of time to read it. Also, the format and design should be consistent with your other outreach materials and should invite your readers to read on.

***When considering publishing a newsletter, ask yourself:***

- ▶ A newsletter needs a clear purpose — what is our single, overriding reason to publish a newsletter?
- ▶ Who will be our audience and what message do we want to deliver regularly?
- ▶ What other publications and information sources already exist and how will ours be different?
- ▶ Newsletters require the active participation of top management with contributions to its content from many different staff members. Do we have the time, personnel and commitment to make it interesting, informative and graphically pleasing?

If you decide to publish a newsletter, one of the first steps is to decide how often you want to publish — balancing the amount of information you can generate and your resources versus budget and time constraints. As a general rule, the more often you publish, the more effective the publication.

Next, assess your audience. What are their information needs? What types of articles would satisfy their needs while still communicating your organization's messages? You might consider:

- ▶ ***Dedicating each issue to an employment and training topic such as "Building an effective Case Management System" or profiling a recent U.S. Department of Labor report on designing youth training programs in cooperation with the private sector.***



**IDEAS...**  
**FOR JTPA**  
**NEWSLETTERS**

"Beginnings" is Central Oklahoma Private Industry Council's quarterly newsletter. Published in a jazzy, easy-to-read format, issues have focused on "President signs JTPA Amendments," "Mayor's Youth Employment Program Cures the Summertime Blues."



Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102  
(405) 297-2940

- ▶ ***A letter from the PIC Chair or SDA Director outlining critical employment and training issues in the community. If it can relate to the lead story — all the better.***



The Director's Report in the Tarrant County (Texas) Private Industry Council's newsletter keeps everyone informed on the current employment and training issues as well as future directions and activities of the PIC.



Tarrant County Employment and Training Administration  
2601 Scott Avenue, Suite 203  
Fort Worth, TX 76103  
(817) 531-5690

- *Readers like to read about people or organizations they know. Consider profiling some of your partners — perhaps a community organization that is making a significant contribution to your outreach program.*



"PIC it up!" is a quarterly newsletter published by the Shasta County (California) Private Industry Council. They dedicated one issue to their county's six Partnership Learning Centers. The newsletter gave an in-depth profile on one of the participants and then provided interesting information on each of the centers, from the center located in the Shasta County Jail to the great success another Center is having in their GED preparation program.



Shasta County Private Industry Council  
1220 Sacramento Street  
Redding, CA 96001  
(916) 246-7911

- *Provide a legislative briefing. This is an excellent vehicle for keeping everyone informed on legislative and regulatory changes.*
- *Profile PIC/SDA events — but keep these to a minimum or the newsletter will appear too self-serving and people will stop reading it.*

You also may want to consider establishing an editorial board composed of PIC and SDA staff members. Then make assignments to each editorial board member to help generate stories and gather information of interest. Your aim is to create a balance in your stories so that there is appeal to a wider audience. Also, plan your editorial topics several issues in advance and outline a typical production schedule. This helps avoid last minute editorial and production crises.

And finally, use reader feedback to check out how your newsletter is doing. Survey readers to see if they are reading your newsletter, which articles they found most informative and if there is other information they would like to see included. If time permits during your initial planning, you may want to survey potential readers in advance with a mock print-up of one or two issues, and ask for feedback in helping you make your initial design and editorial decisions.

## VIDEOS/SLIDE SHOWS

The ultimate goal of either a video or slide production is to produce a professional and crisp visual project that is an asset to your outreach activities.

Videos are one of the most creative outreach activities. They bring to life your message and connect to your audience in a way that written materials cannot. A video project requires very careful and extensive planning. When considering producing a video, ask yourself:

- What is the purpose of the video and how will it be used? Is it for presenting general information about our programs and services? Is it to encourage potential applicants to attend an orientation? Will it be used during orientation? Is it part of our speakers' bureau program?



- ▶ Who is the audience? The audience will most often dictate the style and format of the video.
- ▶ How often will the video be used? The frequency of use may help determine if this is the most cost efficient communications medium.
- ▶ If you are showcasing programs and services, how long will the information portrayed be current? How soon can you afford to update the video? Would a slide show be more appropriate?
- ▶ What is the budget? Video projects can range anywhere from \$10,000 to \$100,000 depending on the scope of the project.

If you decide to produce a video, your next step is to consult with a professional video producer. The producer will be able to help you plan your project based on your budget constraints. They can also recommend a script writer and director, hire the video crew and consult with the film editors.



**IDEA...**

**FOR A VIDEO**

The Pentad Private Industry Council in the State of Washington produced a 12-minute video on their programs and services. They were able to secure in-kind services which helped defray the costs significantly.



The Private Industry Council, Inc.  
PO Box 2360  
233 North Chelan Avenue  
Wenatchee, WA 98807  
(509) 663-3091

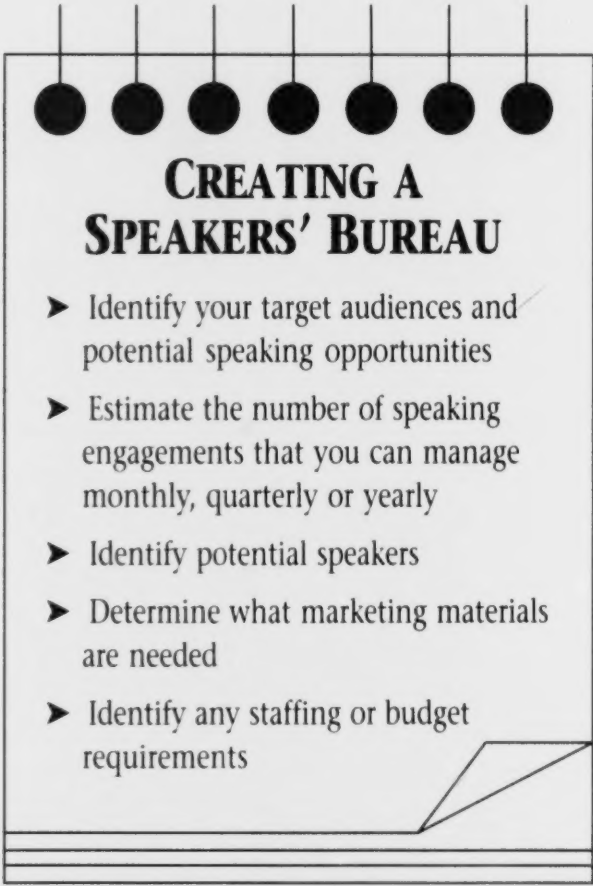
One of the greatest challenges in producing a video is being able to visualize upfront what the final video will look like. Therefore, it is absolutely critical that a professional script writer be hired who can take your outreach message and then translate it into a video script format. SDA staff will need to spend considerable time reviewing the script as well as other elements of the project. Although SDA staff may have limited experience in producing videos, their time spent upfront with the writers, directors and film editors is essential in assuring accuracy of the information presented.

One alternative to a video is to produce a slide show. A slide show can often communicate the same message you wanted to achieve through a video — just as professionally and at much less expense. Also, since the slides are easily replaced, this format allows you to up-date your presentation more frequently. The major difficulty associated with a slide show is that it requires more equipment and is often less “portable” than a video. Many of the issues discussed earlier concerning planning a video need to be considered for a slide show production as well — particularly the professional announcer, photographer and script writer.

## ***SPEAKERS' BUREAU***

One of the most common and effective methods of communicating about the work of your SDA is through public speaking. It allows you to target your message to key constituencies, provides up-to-date information about your programs and services and demonstrates your SDA's openness to the public, creating a more personal outreach to the community.

The basic function of a speakers' bureau is to manage your SDA's public speaking arrangements. Before beginning, it will be helpful to consider the audiences you are trying to reach, the outreach issues you will want to cover and what you want your audience to do as a result of your presentation. Once those issues are determined, you are ready to begin your initial planning.



### **CREATING A SPEAKERS' BUREAU**

- Identify your target audiences and potential speaking opportunities
- Estimate the number of speaking engagements that you can manage monthly, quarterly or yearly
- Identify potential speakers
- Determine what marketing materials are needed
- Identify any staffing or budget requirements

## **SELECTING SPEAKING ENGAGEMENTS**

Your aim is to identify organizations that offer speaking opportunities and have members who correlate to your outreach needs. They could be trade or professional associations such as the Public Defenders Association, Chambers of Commerce, social service organizations such as the United Way, public and private foundations, schools, colleges, and service clubs.

## SELECTING SPEAKERS

The most logical source for speakers is your Private Industry Council. They are uniquely aware of your program and bring credibility to your organization. They also represent a broad range of organizations which permits you to closely match the speaker to the appropriate audience. SDA staff are another good source.

Your criteria for selecting speakers should be based on one or more of the following:

- Interest and willingness to devote the time and effort.
- Specific knowledge of one or more of the topics to be presented.
- Self-confidence and the ability to relate well to people.
- Past speaking experience helpful, but not necessary.

## COORDINATING THE SPEAKING ENGAGEMENTS

The role of SDA staff is to coordinate all of the activities to make the event happen — from preparing letters requesting to send a speaker, to making all of the necessary arrangements in lining up the speaker and then managing the speaker's participation in the event. Here's a checklist of details you may need to pay attention to consider.

## CHECKLIST FOR SPEAKING ENGAGEMENTS

- Date
- Time of presentation
- Anticipated time of speaker's arrival
- Specific location for speaker to check-in
- Parking arrangements
- Name and titles of key individuals in the host organization
- Name of conference coordinator
- Purpose of meeting
- Who is the audience
- Type of meeting; i.e., annual meeting, panel presentation, dinner meeting, etc.
- Time when meeting will conclude
- Time allotted for speech
- Specific topics to be covered
- Is time allotted for a question and answer session?
- Are there other speakers scheduled? If so, whom and topics they will be covering in their speech
- Sample of speakers/topics from other recent events
- Room layout arrangements
- Is there a head table?
- Will media be invited to attend the event?
- Are there audio visual or other equipment needs?

It is also in the best interest of your SDA to take responsibility for preparing the introduction of your speaker. It should be brief, include some biographical information and offer the credentials of your speaker.

And finally, staff should take responsibility for thoroughly briefing the speaker in advance of the engagement to assure that the speaker is informed about the audience, that his or her remarks are appropriately targeted to the audience and that the speaker is informed on the details of the event. Staff should also plan to attend the event. Remember to provide brochures on your program for every member of the audience.

## **PREPARING THE SPEECH**

A speech should be customized and directly related to the audience. First you should identify the objectives of the speech: What is it that you are trying to achieve from the speech? Are you simply informing your audience of your programs and services or, do you want to encourage their participation in your program?

The first questions an audience usually asks itself are "Who is this person?" and "What is their authority on the issue?" Therefore, it is important that the speaker highlight their experience with job training issues at the beginning of the speech, thereby making the important connection to the audience right from the start.

Winston Churchill stressed the following five principles when preparing a speech:

➤ ***Strong beginning.***

You are seeking to engage the audience right from the beginning. Therefore, you may want to put your strongest point first.

➤ ***One dominant theme.***

While there will be one dominant theme, there also will be three or four major points that will complement the theme. This helps build your speech.

➤ ***Simple language.***

Make sure the language is simple, concise, without JTPA jargon and the issues are stated positively.

➤ ***Use of analogy or illustration.***

Support each of your three or four points by using examples or facts. Your facts should be interesting and convincing, and whenever possible they should relate to your audience.

➤ ***Emotional or dramatic ending.***

You want to leave your audience with something to think about — perhaps a plan for solving a problem, or an appeal for action.

## ► MANAGING THE OUTREACH FUNCTION

An aggressive outreach program, well orchestrated, is wholly capable of propelling an SDA or PIC into an even greater and more powerful role in the community, in turn creating the environment that enables the organization to run its programs more effectively and achieve even greater goals. The talent to achieve this rests with the staff responsible for designing and implementing the outreach program, the leadership in the PIC and SDA management staff.

### HOW OUTREACH FITS INTO THE ORGANIZATIONAL STRUCTURE

*First*, outreach is a function that must be part of your organization's strategic objectives. This requires a commitment from the PIC and the SDA Director.

*Second*, staff assigned to carry out the outreach activities must receive the support of the Executive Director. Outreach activities usually require the cooperation of many different individuals from all different departments within the organization. Some SDA directors have chosen to develop a team approach to planning, managing and implementing outreach activities. The entire team is held accountable for the quality and effectiveness of the outreach activities.

In other instances, specific staff are assigned to carry out the outreach activities. This generally requires that staff work in a number of the SDA's operating departments. When this occurs, they need to be organizationally positioned within the purview of the Executive Director. In this configuration, staff must view their role as a consultant to the rest of the organization. They must develop relationships at all levels of the organization to achieve their outreach goals.

*Third*, adequate time and resources need to be committed to the outreach function. Outreach activities should be integrated into the organization's marketing plan and conducted in a professional manner.

### SETTING A BUDGET

**Issue #1:** To gain a presence in the community, you must devote a portion of your budget to outreach. While budgeting for outreach can be difficult, we now have enough experience in JTPA to know that outreach must occur for the programs and services to thrive. The private sector is well aware of the benefits of outreach (marketing) and treat marketing as a basic business concept. They spend anywhere from 10 to 60% of their net profits on marketing alone. Outreach is where your PIC Marketing Committee might be most helpful in setting a realistic outreach and recruitment budget for your program.

**Issue #2:** If your outreach program is successful, chances are you'll need to spend significantly less money on recruitment, thereby saving money in the long run.



**Issue #3:** An outreach program does not have to be expensive to be effective. It is primarily a staff intensive effort. But whatever outreach activities are undertaken, adequate resources must be allocated.

**Issue #4:** The more messages you want to communicate to your audiences, the more costly the outreach program.

## EVALUATION

While outreach is not a technical activity, and as mentioned earlier, it cuts across all departments thereby making it more difficult to isolate its impact, you can evaluate how well your outreach program is working.

*First*, evaluate your outreach program against the mission of the organization. Did the outreach program respond to the mission and goals of the organization? Did the activities support those goals and did the materials developed and the communications in the media reflect that mission?

*Second*, build evaluation criteria into the development of your outreach strategies. Attach to each activity a series of questions that should be answered at the conclusion of the program. For example, if you were evaluating a brochure you might ask:

- ▶ Did the brochure reflect the mission and goals of the organization?
- ▶ Did the brochure create a professional appearance on behalf of the organization?
- ▶ Did the brochure clearly communicate its message to the audience intended?
- ▶ Was the brochure consistently used by staff in their outreach activities?

*Third*, where possible, assess outreach activities quantitatively or through questionnaires and surveys. For example, if securing press coverage six times a year in the local daily newspaper was one of your goals, that is easy to measure.

*Fourth*, evaluate the level of walk-ins and agency referrals you receive which can reasonably be associated with specific awareness raising efforts you initiated by agency coordination, community group contacts, and targeted media efforts.

While it is true these types of measurements are not scientific and call for using professional judgement, your outreach program should be evaluated and adjustments made.

Since outreach is that critical extension of your organization to the potentially eligible population, the community groups which serve the potentially eligible population and the community groups which are made up of the potentially eligible population, it should be refined and enhanced at least annually to make sure that it continues to establish a positive foundation for recruitment in your SDA.

## ► **TRANSITION TO RECRUITMENT**

Whether or not you have been focusing on outreach as a separate function from targeting or recruitment, hopefully now you are convinced of the value of strategically creating partnerships with your human services colleagues to better serve participants. Establishing working relationships with other organizations, community groups and the media can facilitate the task of getting your message out to targeted audiences.

Effective outreach assures that the first step in your recruitment efforts is accomplished — your partner and community agencies are aware of who you are, what you do, and the services you provide for participants.

A commitment to outreach efforts can give you the valuable broad base of support in your community that will put you at an advantage when you launch into your specific recruitment activities. In the next chapter on Recruitment, which immediately follows reference material on Working Examples and citations from the Act and regulations, we offer you guidance for communicating messages to your specific audiences.

## ► WORKING EXAMPLES OF OUTREACH

In the following pages, we have provided you with a collection of examples of outreach activities that have proved successful for other JTPA programs. You are encouraged to browse through them, borrow from them and contact the program listed for more information. We hope these examples will give you new ideas and approaches to enhance your outreach activities!

- Coordinated community and agency efforts to develop "one-stop shop" Job Centers
- The Year of the Job: A radio station's public service commitment to reach out to the community, to help put people back to work
- *Guia del Campesino*: Toll-free, Spanish-English telephone information service designed and operated for farmworkers
- Innovative booklet of information on programs for women
- Reaching out to Dislocated Workers for Feedback on Services
- Partnerships to recruit ex-offenders
- *SEARCH*: Homeless Project
- FOCUS — Future Occupations and Careers Unfolding in Sobriety: Recruiting and serving the population recovering from substance abuse
- Wilderness Challenge/Youth Service Corps: An exciting and innovative Summer Youth Program
- Options and Opportunities: A Dislocated Worker Program

## O U T R E A C H

# WORKING EXAMPLES TO CONSIDER

- EXAMPLE:** **Coordinated community and agency efforts to develop "one-stop shop" Job Centers**
- ORGANIZATION:** Southwestern Wisconsin Private Industry Council, Inc., and Wisconsin Job Service Dodgeville, Wisconsin
- CHALLENGE:** Reports indicated that Southwestern Wisconsin had a large rural area with a targeted hard-to-serve population that was inaccessible and extremely difficult to recruit. Southwestern Wisconsin Private Industry Council delivers services for the five counties of Grant, Green, Iowa, Lafayette, and Richland. The total population is 133,350 with 71 percent of the population categorized as rural by the U.S. Bureau of Census. Within the 94,438 rural population, the farm population is 22,304. The average per capita income is \$11,195. Only two cities have populations between 9,000 and 10,500, other towns/villages are far below that population. There is no public transportation outside of three towns/cities which have limited taxi services.
- DETAILS:** Southwestern Wisconsin Private Industry Council and the local community realized that they needed to provide current and future workers with easy access to information regarding job training, labor markets and other vocational services available throughout the community and service delivery area. Participants could access programs offered at a one-stop shop, the Job Centers serving as a common point of entry for federally funded vocational training programs. Starting in 1985, a "skill center" was developed, which provided a model of a coordinated service delivery system for the five rural Southwestern Wisconsin counties. The Private Industry Council and Job Service provided a "bottom-up" style of coordination. July 1987 was the official opening date of the Job Centers which consisted of integrated staff, co-location, and the utilization of computerized system with Job Service — which has a statewide storing capacity for applicant and employer information. The community outreach for the project, recruitment and delivery system was developed and planned by a collaborative advisory management partnership/team consisting of local employment service and job training providers. Eligible participants were recruited at the SDA and Job Service levels. The model of a five county integrated, coordinated Job Center/Skill Center was a first in Wisconsin.
- RESULTS:** All coordination goals and objectives were achieved, which enabled this area to formulate the foundation for coordination, cooperation and collaboration. Participants were easily recruited to the Job Centers because of the accessible location. Recognitions for this project have been many.
- CONTACT:** Southwestern Wisconsin Private Industry Council, Inc.  
Job Center  
1210 North Bequette Street  
Dodgeville, WI 53533  
(608) 935-3116



**WORKING EXAMPLES TO CONSIDER**

**EXAMPLE:** **The Year of the Job: A radio station's public service commitment to reach out to the community, to help put people back to work**

**ORGANIZATION:** New Hampshire Job Training Council  
Concord, New Hampshire

**CHALLENGE:** The past three years have been an economic nightmare in New Hampshire. The bottom dropped out of the real estate market; bank foreclosures, plant closing, major layoffs and small business failures are at an all time high. The five largest banks in the state were recently taken over by the FDIC. Credit is tight. State and local governments are battling budget deficits.

Unemployment soared from the lowest rate in the country during the 1980s of 2 percent to a level of 7.1 percent. Earlier this year, the New Hampshire Department of Health and Human Services reported the fastest growing welfare caseload in the nation, a doubling of the number of families on welfare. For The New Hampshire Private Industry Council and the New Hampshire Job Training Council running all the Job Training Partnership Act training programs in the State, these tough times translated into a nearly overwhelming demand for JTPA training program, and most distressingly, a sharp drop in the job placement rate of the people who were able to participate in training programs.

**DETAILS:** Working with a 50,000 watt voice for their endeavor, New Hampshire's number one radio station — WOKQ 97.5 FM and NH PIC and Job Training Council made 1991 the Year of the Job. This is a one-year public service commitment by WOKQ 97.5 FM to the NH Job Training Council. Advertising time donated to the Council is valued at over \$100,000. This partnership benefits both organizations, as well as the citizens of New Hampshire and the business community of the state. Helping to put people back to work in this economy is excellent public relations for WOKQ. The exposure the Council receives helps them reach out to the business community with the message that JTPA can help create new jobs. The radio station reaches the State of New Hampshire, Northeastern Massachusetts, and Southwestern Maine with a listening population of 250,000. The audience profile is primarily adults aged 25-54 and the radio format is country music, news and information.

**RESULTS:** This campaign is truly making a difference in people's lives, creating new jobs, and putting people back to work. The announced goal of the Year of the Job Campaign is to help 2,440 residents enter job training programs and find new jobs. The total is updated weekly and read on the air. As of October 21, 1991, the total had reached 2,245 and was expected to reach the goal by the second week in November.

**CONTACT:** New Hampshire Job Training Council  
64 B Old Suncook Road  
Concord, NH 03301  
(603) 228-9500





**WORKING EXAMPLES TO CONSIDER**

**EXAMPLE:** ***Guia del Campesino*: Toll-free, Spanish-English telephone information service designed and operated for farmworkers**

**ORGANIZATIONS:** La Cooperativa Campesino de California, a statewide association of farmworker service organizations, working in coordination with the California Human Development Corporation, Center for Employment Training, Proteus, Central Valley Opportunity Center, the Department of Labor, Employers' Training Resource, the Telecommunications Education Trust (established by the California Public Utilities Commission) and collaboration and cooperation of many other state agencies, community-based organizations and service providers around the state.

**CHALLENGE:** There are approximately three million individuals in the migrant farmworker community of California. Reaching out to the Spanish speaking migrant population of California and directing them to job training programs and social services is a special challenge taken very seriously by the area service providers.

**DETAILS:** *Guia del Campesino*, the farmworkers' guide, is a toll-free, Spanish-English telephone information service designed and operated for the California farmworker. Development of the *Guia del Campesino* databank and audiotext equipment began in August, 1989. The service began operation shortly after the October 17, 1989 earthquake in San Francisco. At that time, the farmworkers' guide went on-line a month ahead of schedule to offer quake victims disaster assistance information in Spanish. *Guia del Campesino* operated as a Northern California project, with its present subject offerings, from then until August, 1990, when the service expanded to statewide operations.

*Guia del Campesino's* toll-free telephone number puts farmworkers in touch with a computer databank of service providers, community-based organization, and general information pertinent to agricultural workers. Labor market information, job training programs, housing, health, education, and immigration information are among the topics available through *Guia del Campesino*. This voice activated computer bank is available 24 hours a day, 7 days a week. The caller can ask questions regarding any region of the State, county, city or group of cities, and which subject each caller is interested in. Every question may be answered by pressing buttons on a telephone or by speaking the words "yes" or "si." When a caller has made the selections, the computer plays the requested information.

## WORKING EXAMPLES TO CONSIDER

The information and referrals included in *Guia del Campesino's* databank are collected and maintained through the participation of an extensive group of service organization and State agencies. Brochures, flyers, magnetic business cards, and numerous other recruitment materials and information are available in both Spanish and English.

**RESULTS:**

*Guia del Campesino's* unique system tracks all the calls received, the questions answered, regional inquiries, services requested, etc. The program could receive two million calls a year and during the peak seasons, the system handles over 1,500 a month. *Guia del Campesino's* system is very easy to use, easily updated and handles eight calls at once. The system has been so successful that they now have a similar system to assist substance abusers.

**CONTACT:**

La Cooperativa  
2101 Capitol Avenue  
Sacramento, CA 95816  
(916) 442-4792



**WORKING EXAMPLES TO CONSIDER**

- EXAMPLE:** **Innovative booklet of information on programs for women**
- ORGANIZATION:** Women's Opportunity Network, Local Campaign for Human Development, Presbyterian Hunger Program, Toledo Area American Baptist Association, Maria Anna Brunner Fund for the Needy, Maria Anna Brunner Fund for Women, Christian Church in Ohio, Lucas County Department of Human Services, Toledo Area Private Industry Council, and Toledo Public Schools  
Toledo, Ohio
- CHALLENGE:** Targeting and recruiting women and helping them learn about available job training programs, education programs and the workforce is a struggle in many areas. The concern is directed towards women who feel they have been locked out of the kinds of jobs they would like, jobs that pay a good salary and benefits, jobs that match their interest and abilities. Toledo Area Private Industry Council in Toledo, Ohio has met this challenge working in cooperation with the Women's Opportunity Network, in Toledo, Ohio.
- DETAILS:** Women's Opportunity Network (WON) is a Toledo Metropolitan Mission — comprised of female students and human and social service agency representatives. Working with partners throughout the community, WON designed and printed an innovative booklet packed with information on programs available to women. The booklet is a resource guide, written for women who want to begin taking charge of their lives and working towards a better future. Although the information in the booklet can be useful to men, many of the programs listed are specific to women.
- The booklet is geared to women who want to get a good job, need to improve or update their job skills, are thinking about continuing their education, are in school, but are uncertain about their direction. Everything from going back to school while an AFDC recipient to choosing a college to deciding on a career and improving basic skills to securing child care are discussed in detail. Also included in the booklet are student success stories, encouraging the participant to go for it! Local organizations, contact names and numbers are given for each category. Developed originally based on input from students and social services, this booklet offers a wealth of information for disadvantaged women. Copies are available upon request.
- RESULTS:** 16,000 booklets have been printed and are available to human and social service agencies, public schools, including adult education and the area job training program.
- CONTACT:** Toledo Area Private Industry Council, Inc.  
331 14th Street  
Toledo, OH 43624  
(419) 244-3900



**WORKING EXAMPLES TO CONSIDER**

**EXAMPLE:**            **Reaching out to Dislocated Workers for Feedback on Services**

**ORGANIZATON:**    Umpqua Training and Employment, Inc.  
Roseburg, Oregon

**CHALLENGE:**      Umpqua Training and Employment, Inc., is located in Roseburg, Oregon — deep in the heart of a rural community filled with dislocated timber workers. This innovative job training program has seen over 2,000 dislocated workers — having served 1,000 of that number in the last 18 to 24 months. Though this program has a high volume service, they continually question whether the participants are receiving the service, training and attention they need. During a recent Department of Labor — Region X visit to Roseburg, it was suggested that Umpqua Training and Employment find out and initiate a telephone poll of Title III participants.

**DETAILS:**           The President of Umpqua Training and Employment (UT&E) and his management team brainstormed the possibilities and deciding that the feedback would be essential to the services they provided, the team took DOL's suggestion with gusto and went one step further. From an MIS printout, selections were randomly made and personal letters signed by UT&E's President were sent to participants inviting them to coffee. Attending the event were the President, Vice-president for Operations and the Marketing/Training Manager. Cookies and coffee were served and there was general conversation surrounding the events and services of the job training program. Participants were asked about their treatment during the training, what they thought of the services provided, if there were any criticisms, or positive comments. Participants were given the opportunity to ask questions and were able to learn more about the services available to them through Umpqua Training and Employment, Inc.

**RESULTS:**          Although the attendance at the coffee socials was low in the beginning, this program is committed to pursuing the effort. The results of the meetings are satisfying and essential to their program and to the community. Word of mouth in this dislocated worker community is tremendous — the events will continue and attendance will grow.

**CONTACT:**           Umpqua Training and Employment, Inc.  
760 NW Hill Place  
Roseburg, OR 97470  
(503) 672-7761



**WORKING EXAMPLES TO CONSIDER****EXAMPLE: Partnerships to recruit ex-offenders**

**ORGANIZATION:** The Private Industry Council of Clackamas County, Inc.  
Employment, Training, and Business Services Division  
Marylhurst, Oregon

**DETAILS:** Clackamas County Community Corrections served 2,000 parolees and probationers in 1990, with offenders coming from federal and state penal institutions, the county jail, and a local residential work release center. Dedicated and experienced ETBS staff understand the unique challenges of this population, and often work hours that will accommodate the clients. ETBS job developers often call joint staffing meetings with the appropriate partner agencies to assure case management with continuity from provider to provider, and often do referrals for Corrections, to sidestep the refusals that sometime face parole or probation officers trying to line up services for their clients.

**RESULTS:** In the past year, Community Corrections referrals to ETBS added up to more than 179 felons and 70 misdemeanors, or 12 percent of Corrections' total annual caseload. The partnership that has formed between parole and probation officers, and ETBS's small staff has become so successful in its job-placement outcomes that word-of-mouth now has many additional referrals piling up from nearby local jurisdictions and federal institutions. Word-of-mouth (among parole officers, as well as parolees) even penetrates penal institutions outside of Oregon, and ETBS staff take calls from people months away from parole who want to get in line for services.

**CONTACT:** The Private Industry Council of Clackamas County, Inc.  
Employment, Training, and Business Services Division  
PO Box 215  
Marylhurst, OR 97036  
(503) 635-4591





## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** *SEARCH: Homeless project*

**ORGANIZATION:** City of Houston — Houston Works, Houston Job Training Partnership Council, SEARCH Homeless Project, the ecumenical community of Houston and 16 non-profits and government agencies  
Houston, Texas

**CHALLENGE:** Houston's local economy has been growing steadily, but the homeless population continue to pose a special challenge for Houston Works and the Houston Job Training Partnership Council. Annual status reports indicated that a very special group of people needed service — the homeless, a group that is economically disadvantaged, constantly moving and relocating and without phones. This group is very difficult to contact and recruit. Area day shelters were already operating at full capacity, but they were forcing the homeless to leave during the day — hoping that they were looking for work, seeking assistance, meeting with agencies, but never giving them an alternative except to find the assistance on their own. Houston Works decided to target the homeless population, and the Council's private initiatives began based on the needs that were not being met by the local area day shelters. JTPA program services are provided as a natural offshoot of that focus.

**DETAILS:** Using JTPA to help the homeless gain economic self-sufficiency led to a new and innovative partnership with subcontracting services to the SEARCH Homeless Project in 1990. Through a special outreach effort to new potential subcontractors, the SEARCH Homeless Project offered the experience needed for providing JTPA services to the homeless population. Experiences includes high support services such as evening shelter, telephones, emergency clothing, and substance abuse counseling all combined with the JTPA services. SEARCH's expertise, enhanced with Houston Work's long-term JTPA program design, produced very positive results and local recognition. From the success of the SEARCH Homeless Project, two other programs for the homeless have since been instituted. The first licensed childcare program for children of the homeless is called "The House of Tiny Treasures." It is a program that offers transitional housing, utilities, deposits, etc., to enable the homeless to secure housing for their families for two years, while completing job training programs. The brightest aspect of the SEARCH Homeless Project has been the elaborate coalition of the ecumenical community and the outreach to and support from the local community. Recruitment takes place in the shelters, churches and area human services agencies. The "communication on the street" gets the word out easily, with the help of many recruitment fliers and brochures.

**WORKING EXAMPLES TO CONSIDER****RESULTS:**

The results reflect the success of this continuing effort. Of the 339 participants enrolled, 194 are working, 64 are in vocational training and 13 have completed their vocational training.

**CONTACT:**

Houston Works  
1919 Smith, Suite 500  
Houston, TX 77002  
(713) 654-1919



**WORKING EXAMPLES TO CONSIDER**

- EXAMPLE:** **FOCUS — Future Occupations and Careers Unfolding in Sobriety: Recruiting and serving the population recovering from substance abuse**
- ORGANIZATION:** Duluth Job Training Programs Division, Duluth Independent School District 709, Duluth area treatment facilities, halfway houses and rehabilitation centers Duluth, Minnesota.
- CHALLENGE:** During their yearly planning process, Minnesota's Duluth Job Training Program saw the necessity to target, recruit and serve the population recovering from substance abuse. This population was deemed as high-risk and did not conveniently fit into traditional job training models — their training had to be quickly geared toward personal success. Reporting indicators such as low placement, low retention once placement was established and drop-out once training funds were secured was reason enough why sobriety standards had to be high and taken into consideration before job training services would be offered.
- DETAILS:** The Future Occupations and Careers Unfolding in Sobriety (FOCUS) Program is a community program acting as a transitional service in assisting the recovering person perform vocational decisions and receive guidance. FOCUS provides assessment and develops a comprehensive strategy with the participant towards accomplishing vocational goals with the premise of their recovery first. FOCUS works closely with community treatment centers, halfway houses, Jobs and Training/Rehabilitation services and the local recovering community for referrals, outreach and recruitment, all in an attempt to keep vocational/career goals aligned with personal recovery issues and objectives. A four week training program of classroom instruction teaches the recovering individuals how to clarify their values and needs, offers assessment, planning and helps put their decisions in to action.
- RESULTS:** Since conception, the program has served 452 individuals.
- CONTACT:** Duluth Job Training Programs Division  
City Hall, Room 332  
Duluth, MN 55802  
(218) 723-3419



**WORKING EXAMPLES TO CONSIDER**

- EXAMPLE:** **Wilderness Challenge/Youth Service Corps: An exciting and innovative Summer Youth Program**
- ORGANIZATION:** Private Industry Council of Westmoreland/Fayette, Inc., seventeen different school districts in Westmoreland and Fayette Counties, local vocational rehabilitation agencies and Offices of Employment Security.  
Greensburg, Pennsylvania
- CHALLENGE:** Recruiting and serving the young people of urban/rural Western Pennsylvania during the Summer Youth Programs has always offered a special challenge to the Private Industry Council of Westmoreland/Fayette, Inc. — creating a program that will excite the young people, yet offer them the skills they so desperately need. An unexpected influx of grant funds allowed the Private Industry Council of Westmoreland/Fayette, Inc. to expand its overall Summer Youth Program. The funding windfall was part of a package to the Commonwealth of Pennsylvania from federal emergency legislation. This legislation was passed in response to increasing community outreach and public awareness of the problems and barriers to employment faced by disadvantaged youth.
- DETAILS:** A lot of recruitment coordination and thought went into the design of the Wilderness Challenge/Youth Service Corps, a Summer Youth Program for young people between the ages of 17 and 21. Making this program stand aside from many others, the Wilderness Challenge/Youth Service Corps combines a one-week survival experience, featuring hiking, camping, rappelling and rock climbing, with 10 to 15 weeks of reclamation or other outdoor work at various sites in the two rural counties of Westmoreland and Fayette in Western Pennsylvania. Working with Area Rehabilitation Councils, drug and alcohol agencies for referrals and recruiting assistance from seventeen area school districts and the Regional Youth Service Center, the Wilderness Challenge program touches many lives of the disadvantaged youth in rural Western Pennsylvania. Last year eleven corps of over one hundred and fifty young participants were involved. Participants are heavily recruited through the local schools, area human services agencies and word-of-mouth by past clients.
- RESULTS:** The drop out rate for this program was extremely low. Given the challenges the young people were faced with, their interest levels remained very high as their excitement increased. Of the young people involved last year, 95 percent completed the program and those that did not, left the program because of illness. A celebratory dinner for more than 120 youth who participated in the program brought an end to one of the most successful summer youth programs ever run by the Council.
- CONTACT:** Private Industry Council of Westmoreland/Fayette, Inc.  
531 South Main Street  
Greensburg, PA 15601  
(412) 836-2600



## WORKING EXAMPLES TO CONSIDER

**EXAMPLE: Options and Opportunities: A Dislocated Worker Program**

**ORGANIZATION:** The Private Industry Council of Northern Cook County  
William Rainey Harper College  
Baxter Healthcare Corporation  
Des Plaines, Illinois

**CHALLENGE:** The Illinois Department of Commerce & Community Affairs reports that 55 percent of the activity in Illinois resulting from notices of plant closing and layoffs occurs in the Chicago metropolitan area. Since 1989, over 2,500 workers from nearly 40 companies in the northwest suburbs have been laid off from their jobs.

**DETAILS:** The Private Industry Council of Northern Cook County in Des Plaines, Illinois, offers *Options and Opportunities* in a collaborative program with area businesses to recruit and provide services to dislocated workers. *Options and Opportunities* is an umbrella for many programs. One is a joint venture with William Rainey Harper College to offer a Career Transition Center at Harper's Northeast Center in Prospect Heights. The center, which opened in December, provides affected workers with a quality package to expand opportunities for obtaining successful employment, ongoing career guidance, use of a telephone bank for job contacts, computers for resume and letter writing, job postings, transition services, and a place to interact with others in the same situation.

Counselors provide help in career assessment, resume preparation, job search strategies, interview techniques, and career counseling. Individuals are better able to deal with the complexities of finding new employment and addressing the feelings experienced with job loss.

In addition to job training assistance, individuals with an entrepreneurial spirit may take advantage of the center's small business resources. Seminars are also available for individuals entering the job market for the first time or for those wishing to change careers. Other career centers are also planned for other Northern Cook County areas. Recruitment brochures are available.

**RESULTS:** This program has not completed its first year but preliminarily reports are promising.

**CONTACT:** The Private Industry Council of Northern Cook County  
2604 East Dempster, Suite 502  
Des Plaines, IL 60016  
(708) 699-9040





## ► CITATIONS FOR OUTREACH

### JOB TRAINING PLAN

Sec. 104.(b) Each job training plan for the programs conducted under title II shall contained to enhance the provision of services and avoid duplication, including -

- 4) a description of linkages established with appropriate agencies, pursuant to sections 205 and 265, designed to enhance the provision of services and avoid duplication, including -
  - (A) agreements with appropriate educational agencies;
  - (B) arrangements with other education, training, and employment programs authorized by Federal law;
  - (C) if appropriate, joint programs in which activities supported with assistance under this Act are coordinated with activities (such as service opportunities and youth corps programs) supported with assistance made available under the National and Community Service Act of 1990 (42 U.S.C. 12501 et seq.); and
  - (D) efforts to ensure the effective delivery of services to participants in coordination with local welfare agencies and other local agencies, community-based organizations, volunteer groups, business and labor organizations, and other training, education, employment, and social service programs;
- (6) procedures for identifying and selecting participants, including -
  - (A) goals for the training and placement of hard-to-serve individuals, and a description of efforts to be undertaken to accomplish such goals;
  - (B) outreach efforts to recruit and expand awareness of training and placement opportunities for such individuals;
- (7) (A) goals for -
  - (i) the training of women in non-traditional employment; and
  - (ii) the training-related placement of women in non-traditional employment and apprenticeships; and
  - (B) a description of efforts to be undertaken to accomplish the goals described in subparagraph (A), including efforts to increase awareness of such training and placement opportunities;

### GOVERNOR'S COORDINATION AND SPECIAL SERVICES PLAN

Sec. 121.(b)(1) The plan shall establish criteria for coordinating activities under this Act (including Title III) with programs and services provided by State and local education and training agencies (including vocational education agencies), public assistance agencies, the employment service, rehabilitation agencies, programs for the homeless, postsecondary institutions, economic development agencies, and such other agencies as the Governor determines to have a direct interest in employment and

training and human resource utilization within the State. Such criteria shall not affect local discretion concerning the selection of eligible participants or service providers in accordance with the provisions of sections 107, 203, or 263.

(c) Governor's coordination and special services activities may include -

(10) providing statewide programs which provide for joint funding of activities under this Act with services and activities under other Federal, State, or local employment-related programs, including Veterans' Administration programs.

(12) making available to service delivery areas appropriate information and technical assistance to assist in developing and implementing joint programs, including youth corps programs, in which activities supported under this Act are coordinated with activities under the National and Community Service Act of 1990 (42 U.S.C. 12501 et seq.).

### **GENERAL PROGRAM REQUIREMENTS**

Sec 141(g)(3)

(B) Each on-the-job training contract that is not directly contracted by a service delivery area with an employer (but instead is contracted through an intermediary brokering contractor) shall, in addition to meeting the requirements of subparagraph (A), specify the outreach, recruitment, participant training, counseling, placement, monitoring, follow-up, and other services to be provided directly by the brokering contractor within its own organization, the services to be provided by the employers conducting the on-the-job training, and the services to be provided, with or without cost, by other agencies and subcontractors.

### **PROGRAM DESIGN - ADULT**

Sec. 204.(a) Essential Elements. -

(2) Additional Requirements. -

(A) Information and Referrals. - Each service delivery area shall ensure that each participant or applicant who meets the minimum income eligibility criteria shall be provided -

- (i) information on the full array of applicable or appropriate services that are available through the service delivery area or other service providers, including those receiving funds under this Act; and
- (ii) referral to appropriate training and educational programs that have the capacity to serve the participant or applicant either on a sequential or concurrent basis.

(b) Authorized Services. - Subject to the limitations contained in subsection (c), services that may be made available to each participant under this part may include -

(2) training-related and supportive services, including -

- (B) outreach to make individuals aware of, and encourage the use of, employment and training services, including efforts to expand awareness of training and placement opportunities for limited-English proficient individuals and individuals with disabilities;
- (C) outreach, to develop awareness of, and encourage participation in, education, training services, and work experience programs to assist women in obtaining non-traditional employment, and to facilitate the retention of women in non-traditional employment, including services at the site of training or employment;
- (E) dissemination of information on program activities to employers;
- (G) programs coordinated with other Federal employment-related activities;

### LINKAGES - ADULT

Sec. 205.(a) In General. - In conducting the program assisted under this part, service delivery areas shall establish appropriate linkages with other Federal programs. Such programs shall include, where feasible, programs assisted under -

- (1) the Adult Education Act (20 U.S.C. 1201 et seq.);
- (2) the Carl D. Perkins Vocational and Applied Technology Education Act (20 U.S.C. 2301, et seq.);
- (3) the Wagner-Peyser Act (29 U.S.C. 49 et seq.);
- (4) part F of title IV of the Social Security Act (42 U.S.C. 681 et seq.);
- (5) the employment program established under section 6(d)(4) of the Food Stamp Act of 1977 (7 U.S.C. 2015(d)(4));
- (6) the National Apprenticeship Act (29 U.S.C. 50 et seq.);
- (7) the Rehabilitation Act of 1973 (29 U.S.C. 701 et seq.);
- (8) title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.);
- (9) chapter 2 of title II of the Trade Act of 1974 (19 U.S.C. 2271 et seq.);
- (10) the Stewart B. McKinney Homeless Assistance Act (Public Law 100-77; 101 Stat. 482);
- (11) the United States Housing Act of 1937 (42 U.S.C. 1437 et seq.);
- (12) the National Literacy Act of 1991 (Public Law 102-73);
- (13) the Head Start Act (42 U.S.C. 9831 et seq.) (for purposes of child care services); and
- (14) any other provisions of this Act.

(b) Other Appropriate Linkages. - In addition to the linkages required under subsection (a), each service delivery area receiving financial assistance under this part shall establish other appropriate linkages to enhance the provision of services under this part. Such linkages may be established with local educational agencies, local service agencies, public housing agencies, community-based organizations, business and labor organizations, volunteer groups working with disadvantaged adults, and other training, education, employment, economic development, and social service programs.

**PROGRAM DESIGN - YOUTH**

Sec. 264.(a) Year-Round Operation. - The programs under this part shall be conducted on a year-round basis. Services shall be made available on a multi-year basis as appropriate.

(b) Essential Elements. -

(2) Additional Requirements. -

(A) Information And Referrals. - Each service delivery area shall ensure that each participant or applicant who meets the minimum income eligibility criteria shall be provided -

(i) information on the full array of applicable or appropriate services that are available through the service delivery area or other service providers, including those receiving funds under this Act; and

(ii) referral to appropriate training and educational programs that have the capacity to serve the participant or applicant either on a sequential or concurrent basis.

(c) Authorized Services. - Subject to the limitations contained in subsection (d), services which may be made available to youth with funds provided under this part may include -

(2) training-related and supportive services, including -

(A) the services described in section 204(b)(2);

**LINKAGES - YOUTH**

Sec. 265.(a) Educational Linkages. - In conducting the program assisted under this part, service delivery areas shall establish linkages with the appropriate educational agencies responsible for service to participants. Such linkages shall include -

(1) formal agreements with local educational agencies that will identify -

(A) the procedures for referring and serving in-school youth;

(B) the methods of assessment of in-school youth; and

(C) procedures for notifying the program when a youth drops out of the school system;

(2) arrangements to ensure that the program under this part supplements existing programs provided by local educational agencies to in-school youth;

(3) arrangements to ensure that the program under this part utilizes, to the extent possible, existing services provided by local educational agencies to out-of-school youth; and

(4) arrangements to ensure that for in-school participants there is a regular exchange of information between the program and the educational agency relating to participant progress, problems, and



needs, including, in appropriate circumstances, interim assessment results.

(b) Education And Training Program Linkages. - In conducting the program assisted under this part, service delivery areas shall establish appropriate linkages with other education and training programs authorized under Federal law. Such programs shall include, where feasible, programs assisted under -

- (1) part B of title IV (the Job Corps);
- (2) parts A through D of chapter 1 of title I of the Elementary and Secondary Education Act of 1965 (20 U.S.C. 2711 et seq.);
- (3) the Carl D. Perkins Vocational and Applied Technology Education Act (20 U.S.C. 2301 et seq.);
- (4) the Individuals with Disabilities Education Act (20 U.S.C. 1400 et seq.);
- (5) the Wagner-Peyser Act (29 U.S.C. 49 et seq.);
- (6) part F of title IV of the Social Security Act (JOBS) (42 U.S.C. 681 et seq.);
- (7) the Food Stamp Act (7 U.S.C. 2011 et seq.);
- (8) the National Apprenticeship Act (29 U.S.C. 50 et seq.);
- (9) the Stewart B. McKinney Homeless Assistance Act (Public Law 100-77; 101 Stat. 482); and
- (10) any other provisions of this Act.

(c) Other Programs. - In addition to the linkages required under subsections (a) and (b), service delivery areas receiving financial assistance under this part shall establish other appropriate linkages to enhance the provision of services under this part. Such linkages may be established with State and local service agencies, public housing agencies, community-based organizations, business and labor organizations, volunteer groups working with at-risk youth, parents and family members, juvenile justice systems, and other training, education, employment and social service programs, including programs conducted under part A.

### **NON-DISCRIMINATION AND EQUAL OPPORTUNITY RULES**

29 CFR 34.6(a). Recipients shall take appropriate steps to ensure that communication with beneficiaries, applicants, eligible applicants. . . and members of the public with disabilities, are as effective as communications with others.

29 CFR 34.23(b)(1). In recruitment brochures and other materials which are ordinarily distributed to the public to describe programs funded under JTPA or the requirements for participation by recipients and participants, recipients shall indicate that the JTPA-funded program or activity in question is an "equal opportunity employer/program" and that "auxiliary aids and services are available upon request to individuals with disabilities." Where such materials indicate that the recipient may be reached by telephone, the materials shall state the telephone number of the TDD or relay service used by the recipient, as required by § 34.6.

29 CFR 34.23(b)(2). Recipients required by law or regulation to publish or broadcast program information in the news media shall ensure that such publications and broadcasts state that the JTPA-funded program or activity in question is an equal opportunity employer/program (or otherwise indicate that discrimination in the JTPA-funded program or activity is prohibited by Federal law),



and indicate that auxiliary aids and services are available upon request to individuals with disabilities.

29 CFR 34.23(d). A significant number or proportion of the population eligible to be served or likely to be directly affected ... may need service or information in a language other than English in order that they be effectively informed of or able to participate in the JTPA-funded program or activity. In such circumstances, the recipient shall take reasonable steps . . . to provide to such persons, in appropriate languages, the information needed; ... .

29 CFR 34.23(e). As provided in § 34.6, the recipient shall take appropriate steps to ensure that communication with individuals with disabilities are as effective as communications with others.

### **HIGHLIGHTS OF COMMENTS SECTION OF INTERIM FINAL REGULATIONS**

The following principles are central to the Department's efforts to oversee and guide the implementation process:

JTPA and other human resource programs must have a workable system of relationships to jointly serve their participants. It is unlikely that any single program will have the capacity to meet all the training, educational, and service needs of a participant. The Department is proposing regulations that foster the development of joint relationships among programs in order to provide high quality comprehensive services to individuals and to increase the capability of JTPA programs in conjunction with other human resource programs to maximize quality services to individuals.

Sections 104(b)(6) and (13), 121(b)(3) and 122(b)(5)-(7) of the Act require the States and SDAs to set goals and report on program accomplishments. The Department expects that each State's and SDA's plans and activities will reflect the development of outreach and promotional materials and/or activities aimed at making women aware of the programs and the services available through JTPA, particularly of non-traditional training and placement opportunities. Examples of outreach materials include, but are not limited to, non-traditional career information modules, video and print materials on non-traditional career options (for counselors), recruitment brochures targeted at both the client and the employer, and dissemination of preexisting resource materials and/or model curricula. States may also wish to undertake statewide public education campaigns, similar to those conducted for literacy programs, on non-traditional training and employment opportunities.

Sections 205 and 265 of the Act require that SDAs operating adult and year-round youth programs establish appropriate linkages with other Federal human resource programs. Other linkages may also be established with appropriate State and local educational, social service, and public housing agencies, and with CBOs, business and labor organizations, volunteer groups and others to avoid duplication and to enhance the delivery of services. In addition, youth programs are required to establish linkages with appropriate educational agencies which include formal agreements for procedures for referring and serving in-school youth, methods of assessment, notification when students drop out of school, and arrangements with educational agencies for services for in-school and out-of-school youth. These provisions are reflected in §628.545.

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# RECRUITMENT



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## INTRODUCTION TO RECRUITMENT

This portion of the Comprehensive Resource Guide provides information intended to assist SDAs in creating and implementing effective recruitment strategies that are focused and targeted in their approach.

The goal of this chapter is to illustrate some of the opportunities SDAs have to both meet the letter and spirit of the JTPA amendments, and to tailor recruitment strategies to meet program goals.

The first part of the chapter highlights key recruitment activities, with "how to" information on implementing recruitment strategies, such as open houses, telemarketing campaigns and other creative approaches. Next, the chapter highlights ways to orchestrate your selling presentation to potentially eligible individuals.

The chapter also covers print materials for recruitment, including information on how to create brochures and flyers, posters, direct mail letters, door hangers, print advertisements, bulletin boards, and billboards. The chapter also highlights how-to's for writing headlines and copy, designing ads, using recruitment advertising agencies, radio, television and newspapers.

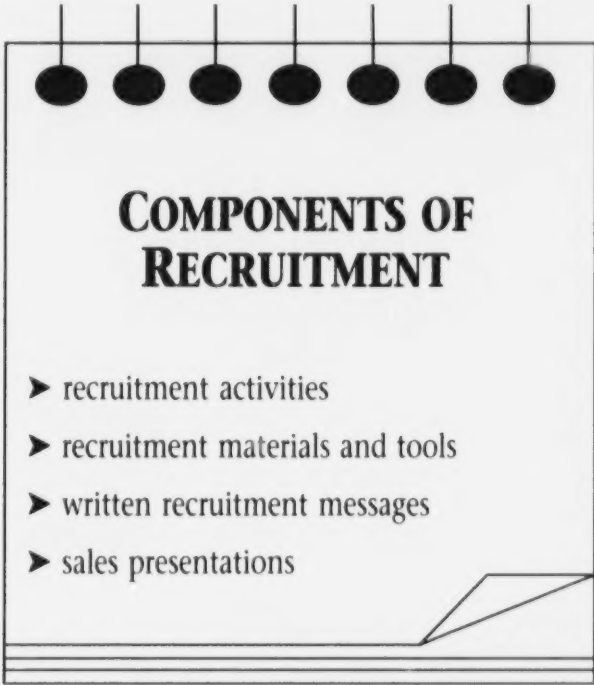
The chapter concludes with specific information for reaching hard-to-serve groups through a targeted approach to recruitment. AFDC recipients, dropouts, individuals with disabilities, minorities, ex-offenders and other labor market segments are identified, with tips and guidelines for developing and implementing recruitment ideas to effectively reach out to attract these potentially eligible individuals to your program.



## ➤ DEFINITION OF RECRUITMENT

*Recruitment is the program operations function which attracts potentially eligible targeted individuals and sells them on the benefits of participating in the JTPA program.*

Recruitment is different from outreach just as marketing is different from selling: marketing is the process in which you create the image and climate so that potential customers are interested in buying; selling is actually making the sale. Likewise, outreach creates the climate, image and reputation so that you can recruit and attract the individuals you will ultimately serve.



### COMPONENTS OF RECRUITMENT

- recruitment activities
- recruitment materials and tools
- written recruitment messages
- sales presentations

*Recruitment activities* can include everything from a direct mail campaign to the use of public service announcements on radio and television, to newspaper advertising, to open houses and other recruitment events. *Recruitment materials and tools* are the brochures, posters, direct mail letters and other printed pieces that are the tools that help communicate the message to potentially eligible candidates. *Written recruitment messages* are the advertising copy — the written words and phrases —

## R E C R U I T M E N T

that are used to attract and sell individuals on the benefits of utilizing JTPA services. *Sales presentations* are how individuals are verbally informed about the features and advantages of JTPA services.

Targeted recruitment is the use of sales strategies for a pre-determined set of "customers." In targeted marketing strategies, customers are identified in advance, and then specific marketing and sales activities are developed to derive the most benefit from dollars spent. Likewise, in targeted recruitment, the potentially eligible individuals are identified, then specific outreach and recruitment activities are developed with that audience in mind.

Targeted recruitment is different from general or generic recruitment. In general recruitment, activities, messages and other components are developed to attract as many customer groups as possible. However, like generic marketing activities, instead of appealing to and attracting many customers, it usually appeals to no one because it is so bland and non-specific. For example, McDonald's advertising campaigns have gained international recognition because they are trying to sell hamburgers to the world — not with a generic approach — but with an approach that focuses on each of their target markets. Ronald McDonald appeals to children; Mac Tonight appeals to young adults; ethnically diverse actors and actresses appeal to these markets. Like effective targeted marketing, targeted recruitment is developed with an eye on the specific labor market segments being sought after, and will generally yield more potentially eligible individuals.

General recruitment strategies also have one major flaw: they often appeal to the majority, and fail to appeal to the hard-to-serve clients who most need JTPA services. Therefore, it is critically important to be as focused as possible in designing recruitment strategies.

For the purposes of this document, when the term "recruitment" is used, it is understood that a targeted recruitment approach is what is being emphasized.

## ► PURPOSE AND INTENT OF RECRUITMENT

Perhaps it's easier to answer the question "why recruit?" with an explanation of what happens when you don't recruit. When you don't recruit, you make the following assumptions:

- potentially eligible and hard-to-serve individuals know about and understand the services offered by JTPA,
- potentially eligible and hard-to-serve individuals understand that they are eligible to receive benefits from JTPA,
- the individuals who are most in need and able to be served will be those that are most aware of the services offered by JTPA,
- eligible individuals see JTPA services as offering positive, desirable outcomes, and
- others in the community, including employers and other service providers, will help steer eligible candidates to JTPA services.

In a perfect world with perfect answers, these assumptions would be correct. However, given the current realities, it is understood that those who want and need to be served may not know they are eligible for JTPA services, and often don't even know what JTPA is! Thus the need for recruitment.

Additionally, the potentially eligible individual has to be 22 years of age or older for Title IIA and be economically disadvantaged. Except for a seventh category that SDAs have the option of including, not less than 65 percent of adults in the program should be individuals who are in one of six hard-to-serve categories. Given the explicit target groups and the required percentage of enrollment suggests the necessity for recruiting to assure that the statutory requirements are met. The same can be said for in-school and out-of-school youth under Title IIC.

Section 104(b) of the Act requires that each job training plan for programs conducted under Title II contain procedures for identifying and selecting participants, including outreach efforts to recruit and expand awareness of training and placement opportunities for these individuals.

Recruitment will also assist you in meeting your program goals, will permit you to connect with your targeting decision, and will help you meet your needs in a number of areas. Further, recruitment will:

- Help you meet your enrollment goals for serving target groups,
- Meet program component needs by recruiting people who are appropriate for the available slots resulting in proper use of funds,
- Establish an appropriate number of candidates to be served so that individual expectations are being met and quality services can be provided, and
- Assist in meeting equity of service requirements for achieving equal opportunity.



## R E C R U I T M E N T

Further, recruitment is an essential effort to provide equitable services by broadening the composition of the pool of those considered. Equal Employment Opportunity regulations mandate that JTPA recipients make efforts to provide equitable services among substantial segments of the eligible population, including outreach efforts to broaden the composition of the pool of those considered for participation to include members of both sexes, the various race/ethnicity and age groups and individuals with disabilities. While this section does not make a requirement to serve all groups in proportion to their representation in the population, it does require that JTPA program operators make outreach and recruitment efforts so that all population segments have fair access to JTPA-funded programs, activities and services.

## ➤ **METHODS AND TECHNIQUES FOR RECRUITMENT**

### ***HOW TO RECRUIT POTENTIALLY ELIGIBLE INDIVIDUALS***

#### **BEFORE YOU BEGIN**

Many JTPA staff jump into recruitment activities without consideration of their mission, program goals, or need for an integrated plan, and then wonder why their recruitment activities fail. Because the success of your recruitment strategy is based upon its coordination with your mission, you need to carefully evaluate your program needs and goals before you begin any recruitment activity. Since the most successful recruitment campaigns are targeted to specific labor market segments and are integrated with your total business plan, the first step is to decide who should be targeted. The Targeting chapter includes detailed information on this phase.

The next step is in developing specific recruitment activities as an outgrowth of image, marketing, and public relations campaigns — all a part of your overall outreach process. Outreach is an important element in planning targeted recruitment as it provides the framework for specific recruitment activities, materials, messages, and sales presentations. The chapters on Marketing Plan and Outreach contain additional information on this important planning component.

#### **PLANNING YOUR RECRUITMENT STRATEGY**

Next, take the time to put together a comprehensive recruitment strategy for your program year to include in your Marketing Plan. Identify both the specific labor market segments to be targeted and the specific recruitment components that will be used to reach the specified group. Components to consider include:

- recruitment activities
- recruitment materials and tools
- written recruitment messages
- sales presentations

The following section provides information on each of these components of your recruitment strategy, as well as information for serving hard-to-serve clients. Realize, too, that picking or choosing one or two recruitment activities will probably not accomplish your goals unless these activities, messages and other recruitment components are integrated or connected to your mission. Recruitment strategy should



## R E C R U I T M E N T

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be closely linked with your organization's targeting, outreach, and public relations efforts and activities.

Also, using only one recruitment idea will generally not bring you all the participants needed to meet your goals — you must structure an entire strategy in order to be successful.

Recruitment strategies don't need to cost a lot of money to be successful. Many of the ideas outlined in this Guide are inexpensive to implement, given the creativity to coordinate activities with other agencies, community groups, employers and other recruitment "partners." Don't disregard any idea until you've considered how you might share costs with another partner (or get a partner to fund the entire event!). You may be able to work with an employer interested in attracting older adults, for example, to fund targeted recruitment activities for this population segment. Employers with targeted recruitment needs or interests may be willing to completely fund these activities, or share in the recruitment expense. Or you may be able to partner with another service agency that also needs to attract, or to more effectively serve, a constituent group, as is highlighted in the section on referrals and task forces. More information on putting together your recruitment budget is highlighted later in this section.

Also, realize that some of the best inexpensive ideas may not be worth your time unless they bring in eligible candidates, and that initially high cost ideas may, in the long run, be fairly reasonable given the ability to reach large numbers of hard-to-serve client groups. Ideas on tracking and analyzing cost per benefit ratios are outlined later in this section.

## **RECRUITMENT ACTIVITIES**

Have you noticed the techniques of really effective sales people in a department store? They don't just sit back and wait for you to bring merchandise to them in order to make the sale. The really successful sales people are those who anticipate your needs and offer suggestions for purchases you might make. The same is true in recruitment: you'll be better able to make the "sale" — to attract eligible candidates — if you are actively involved in the recruitment process.

When you sit back and wait for eligible individuals to walk through your door to be served, that is passive recruitment. When you rely on eligible candidates to initiate the first step (by reading an advertisement in the "help wanted" section of the newspaper, for example), you assume that those to be served are actively seeking assistance. However, since many of the individuals who can be served are not actively seeking assistance, more active and intrusive forms of recruitment must be used.

Active — or intrusive — recruitment reaches individuals even though they were not initially interested in or seeking your services. For example, direct mail, telemarketing, and television and radio advertisements are all successful advertising mediums because they reach individuals before they may be interested in a product or service. Likewise, these same active and intrusive approaches work effectively in recruitment.

Outlined in this section are various active and intrusive forms of recruitment activities to reach the individuals you want to serve.

### **TELEMARKETING**

Telemarketing is the process by which candidates are reached at home through the telephone. To be effective, telemarketing campaigns should be conducted by someone who is comfortable talking with individuals over the phone. Ideally, a script is used so that key information, benefits and other details can be communicated with ease.

Lists of names and telephone numbers can be obtained in much the same way as mailing lists for direct mail campaigns. For cost effective campaigns, work with other service agencies to obtain lists of clients for targeted recruitment initiatives.

In developing your script, refer to the section on Recruitment Messages and Sales Presentations later in this chapter to ensure that you "sell" the benefits to eligible individuals.

### **OPEN HOUSE**

Invite potentially eligible individuals to visit your organization for a recruitment event — an open house. Open houses are appealing to the reluctant client — the one who is not sure what JTPA is about and if it is the right service. Open houses are generally less formal than other recruitment formats, and allow individuals to come and ask questions in an unstructured setting. You may even be able to entice

## **R E C R U I T M E N T**

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some individuals to attend by encouraging those invited to bring a friend. Also, if targeting young mothers, the provision of day care services will be appreciated.

Offer to enroll those eligible individuals attending the open house in your program at some point during the event.

Invite individuals to attend this recruitment event through several different media — newspaper and other print advertising, radio and television advertisements (use PSAs for no-cost options), telemarketing and direct mail.

### **IDEAS FOR PROMOTING AN OPEN HOUSE**

- send a personal letter to targeted individuals inviting them to attend (see the section on direct mail for more information),
- inform individuals of the event by using a printed invitation,
- use radio PSAs to advertise the event, and encourage listeners to obtain additional information (dates, times, location of the open house) by looking at the advertisement in the Sunday classified section of the newspaper,
- make direct phone calls to potentially eligible candidates, inviting them to attend,
- encourage individuals to call before they come by (to answer their questions and to qualify them as eligible participants), and
- use a multi-media blitz to promote this event, using several promotion activities in addition to media releases.

### **CAREER/JOB FAIR**

Career fairs, or job fairs, are an excellent method to appeal to two target markets — potentially eligible participants as well as employers. Job and career fairs differ from an open house in that a job fair offers job seekers not only the opportunity to talk with you about JTPA services, but also to directly talk with employers who are exhibiting at the fair. An open house is generally sponsored by only your organization, and is absent the participation of employers. One of the major goals of this event is to enroll eligible individuals in JTPA services.

Job fairs are particularly effective for individuals who are not sure what services are available, and if they are eligible for participation. A job fair provides an informal, non-threatening format for exploring services, and immediately offers a potential benefit (an employer contact/interview/job offer) as a further incentive.

JTPA programs often sponsor job fairs, but may also want to consider participating in a fair conducted by another outside source. Such fairs may be sponsored by community groups, schools, groups of employers, employer associations, or independent third parties who conduct these fairs for profit.

Investigate these options for reaching potential targeted candidates, and for promoting the services of your organization. If there is a fee for participation in the fair, consider bartering for free exhibit space (offering employer contacts, applicant contact, staffing services, etc.).

Many JTPA programs find that career and job fairs are an excellent method for attracting and selling many potential participants at one time on what JTPA has to offer them. Further, by orchestrating a recruitment event and utilizing multiple methods for advertising the event, resources can be maximized.

Publicize your career or job fair in the same ways you might advertise for an open house, including the following:

- ▶ send a personal letter to targeted individuals inviting them to attend (see the information on direct mail for more information),
- ▶ inform individuals of the event by using a printed invitation,
- ▶ use radio PSAs to advertise the event, and encourage listeners to obtain additional information (dates, times, location of the open house) by looking at the advertisement in the Sunday classified section of the newspaper,
- ▶ make direct phone calls to potentially eligible candidates, inviting them to attend, and
- ▶ use a multi-media blitz to promote this event, using several promotion activities in addition to media releases.



**IDEA...**

**FOR A  
JOB FAIR**

The Private Industry Council of Lake County (Waukegan, Illinois) staff and board members felt that the PIC's message needed to reach a broader range of both job seekers and businesses. Although PIC staff felt that a large scale event such as a job fair would meet these goals, such an event seemed beyond their financial and staffing capabilities. Therefore, the PIC of Lake County joined forces with the Chicago Tribune, one of the midwest's oldest and best known daily newspapers, to co-sponsor the Lake County Job Fair.

The PIC's first job fair was so successful that a second job fair was scheduled with the same sponsors and location. At this fair PIC staff set up a resume critiquing clinic to assist job seekers and heighten the PIC's exposure during the fair. A third fair is already being investigated.

Additional information on this recruitment event is highlighted in the section on <sup>1</sup>Working Examples.



The Private Industry Council of Lake County  
415 West Washington Street  
Waukegan, IL 60085  
(708) 249-2200

## PLACES OF WORSHIP

Many JTPA eligible individuals may be reached by working with local places of worship. Many large churches, synagogues and temples have placement services, and may be able to refer candidates in need of special assistance directly to your program. In smaller churches, the pastor or worship leader may have intimate knowledge of the needs of the congregation, and may be able to refer individuals to you. Also, consider bulletin boards as a place for posters and notices, and church publications as a means of communicating your recruitment message.



**IDEA...**

**FOR  
RECRUITING  
THROUGH  
CHURCHES**

You can reach different target markets very effectively by working with local places of worship. And, since the place of worship is often a closely knit group, you may be able to connect with hard-to-reach client populations by making the introduction through the church. For example, the Private Industry Council's East County Employment and Training Center in Gresham, Oregon, contacts the local Catholic church as a means to target the Hispanic community.



The Private Industry Council's East County Employment and Training Center (ECET)  
55 NW 3rd  
Gresham, OR 97030  
(503) 667-7056

Places of worship may also be an excellent location for providing special recruitment events, such as job fairs or information seminars or workshops. Work closely with these organizations to reach mutually beneficial goals.

## REFERRALS AND TASK FORCES

Sections 205 and 265 of the Act mandates that service delivery areas establish appropriate linkages with other Federal programs. Such programs include, where feasible, programs assisted under the Adult Education Act, the Carl Perkins Vocational and Applied Technology Education Act, the Wagner-Peyser Act, the Food Stamp Act, the Steward B. McKinney Homeless Assistance Act, the National Literacy Act of 1991, Head Start, Title V of the Older Americans Act and other provisions of JTPA.

Additionally, SDAs are required to establish other appropriate linkages with, for example, state and local educational agencies, local service agencies, public housing agencies, community organizations, business and labor groups, volunteer groups working with disadvantaged adults, and other training, education, employment, economic development, and social service programs.

Word of mouth is still the best form of advertising today. You can take advantage of this powerful recruitment medium by identifying the groups that can provide recruitment assistance to you and implementing informal or formal programs to encourage eligible referrals.



## R E C R U I T M E N T

What are some of the groups that might work with you in your recruitment efforts?



### **POTENTIAL REFERRAL GROUPS**

- other professionals in social service agencies
- community leaders
- school teachers and counselors
- JTPA alumni who are currently employed
- current JTPA enrollees
- parent groups
- local media
- employer groups and associations

Once you have identified the groups with which you will work, investigate both formal and informal methods to tap into these resources. You might, for example, offer some sort of incentive or reward for those who refer many eligible candidates. A task force, or Business Advisory Council (BAC) might be established, with a prime focus on recruitment. Or, you may just want to informally keep in touch with key individuals to let them know of your interest in serving the community employment needs.

## R E C R U I T M E N T



### **IDEA... FOR RECRUITING AT-RISK YOUTH**

The Private Industry Council's Youth Employment Institute in Portland, Oregon, has had great success in targeting and recruiting gang-affected and at-risk youth. While YEI currently depends quite heavily on word-of-mouth as a primary recruitment tool, staff originally did a lot of footwork in establishing a network of referral sources.

In initiating a targeted start-up effort for gang-affected and at-risk youth, staff felt that establishing contacts with referring agencies was critical to leveraging program staff's ability to identify prospective program participants. Typically, such a network would include the welfare system, the juvenile court system, the housing authority, and community-based organizations, especially those involved with youth and/or gang task forces.

While this method is fairly staff intensive at the onset, it has produced significant results for the program. YEI currently has a far greater demand for services from this population than resources permit.

Additionally, as the program has established an identity within the community, graduates and current program participants have been responsible for generating a significant number of referrals to the program, making word-of-mouth a significant means of recruiting new participants from the target population. Additional information can be found later in the Working Examples Section.



The Private Industry Council's Youth Employment Institute (YEI)  
1704 NE 26th  
Portland, OR 97212  
(503) 280-1058

The Panhandle Area Council in Hayden, Idaho, had a mission: to restructure their program to save staff time and provide more quality services to targeted participants, including females, dropouts and welfare recipients. The PAC staff wanted to create an environment that was fun, creative, positive, and provided incentives and trust for their clients and co-workers. As a result, the staff developed a referral contest and prizes monthly at the Department of Health and Welfare for case managers, incentive awards for small successes of participants and other methods of rewards. Evaluations have been wonderful from the participants. The program has been highly recommended in the local judicial, welfare, state industrial and social security systems.



Panhandle Area Council  
11100 Airport Drive  
Hayden, ID 83835  
(208) 772-0588



### **IDEA... FOR RECRUITING WOMEN, DROPOUTS, AND WELFARE RECIPIENTS**

## DOOR TO DOOR CANVASSING

The Private Industry Council's East County Employment and Training Center (Gresham, Oregon) has been especially successful in targeting recruitment efforts toward the Hispanic community. Key to effective recruitment has been the development of an effective door-to-door canvassing campaign. Staff has emphasized the need to commit to making return visits to individual households to establish credibility and trust as part of the recruitment process.



The Private Industry Council's East County Employment and Training Center (ECET)  
55 NW 3rd  
Gresham, OR 97030  
(503) 667-7056

In addition to door to door canvassing, another recruitment tool includes the use of door hangers — a recruitment message that may be placed on the door knob, or in newspaper boxes. These methods are particularly effective in sending your recruitment message to a specific geographic area.



**IDEA...**

**FOR  
RECRUITING  
IN THE  
HISPANIC  
COMMUNITY**



**IDEA...**

**FOR USING  
VIDEOS TO  
RECRUIT  
WELFARE  
RECIPIENTS**

## VIDEOS

Videos are a powerful way to communicate a recruitment message to potential client groups. The Philadelphia Private Industry Council developed a video targeted at welfare recipients, utilizing a familiar television soap opera format. The video, called "A Brand New Day," features characters who faced employment barriers similar to those of the target audience: low motivation, limited education and job skills, English language deficiencies and child care needs. It particularly addresses many women's gut-wrenching decision to leave home and children behind for work opportunities. The story line is interrupted by four brief "commercial messages." The commercials, subtitled in Spanish, provide concrete information on program services, along with enrollment information. The video is generic in nature and could be used by any urban SDA. A key message is a sensitivity to potential eligible individuals' concerns.



The Private Industry Council of Philadelphia, Inc.  
3 Park Way, Suite 501  
Philadelphia, PA 19102  
(215) 963-2100

## **VIDEOS CAN BE USED IN MANY DIFFERENT WAYS**

- shown at one point of an open house event,
- shown continuously at job/careers fair or other recruitment events,
- used to show opportunities to serve the clients of other service agencies,
- played for those waiting for services in other service offices, and
- provided to the media to excerpt for television programming.

Outside of meeting recruitment needs, videos can also be a part of the tools of your entire marketing initiative.

## **OTHER RECRUITMENT IDEAS**

Other ideas for recruitment may include point of sale advertising, which includes advertising at a retail employer's place of business. Point of sale (POS) or point of purchase (POP) recruitment messages may take these forms:

- bag stuffers (messages printed on flyers that are inserted into retailers bags),
- printed messages on grocery store bags,
- restaurant placements and tray liners,
- counter cards,
- readerboard signs (especially to advertise recruitment events), and
- cash register receipt messages.

Talk with local retail employers to develop co-recruitment efforts that will assist you in recruiting targeted individuals, based upon their customer base.

## ***SALES PRESENTATIONS***

### **SELLING BENEFITS**

What do you have to offer eligible individuals? How can you "sell" them on the opportunities of working with you? This worksheet is designed to help you discover some features, advantages, and benefits to sell to prospective program participants.



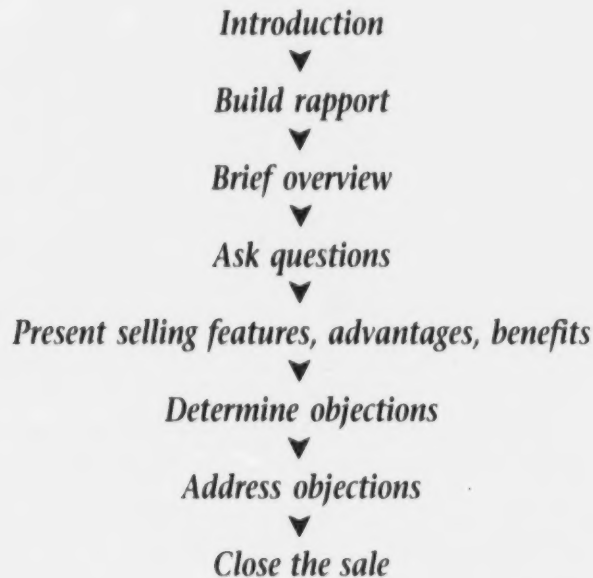
**JTPA BENEFITS TO SELL**

- Services of the program
- Goals of the program
- Goals for participants
- Staff to assist the participant
- Rewards of the program
- Training program elements
- Placement opportunities
- Opportunities to meet new people
- Challenges of the training program
- Compensation opportunities
- Other benefits
- Other



## YOUR "SALES PRESENTATION" TO ELIGIBLE INDIVIDUALS

To enroll eligible individuals, you must often sell the benefits of working with your program in much the same way as any other sales person in a sales presentation. Consider these elements of an effective sales presentation:



In the first step, the introduction, you provide your name and title and clarify the name of the individual, including how he or she prefers to be addressed. The next step is in building rapport with the individual — discussing something that will help you connect with that person. Perhaps it is a discussion of how they were able to find your office; it might be chit-chat about the weather, or about a sports event the day before. In any event, it is an opportunity to begin to establish the relationship with that individual.

The brief overview — or a 30-second commercial — is the next step in the process. In this phase of the sales presentation you briefly describe what services you will be able to offer, without going into great detail. Many ineffective sales people make the mistake of presenting the entire sales presentation at this point, before asking good questions of the potential customer. This sequencing is ineffective because it fails to establish the specific needs of the individual before the presentation demonstrates how the service can meet those needs.

In the next phase, effective questions are asked, determining specific needs of the individual. Then, once needs are determined, the actual sales pitch can begin, showing the individual how the program's services can meet those needs. To be effective, the sales person needs to describe the services by highlighting the features, advantages, and benefits to the individual, tailoring these remarks to the stated needs.

## **R E C R U I T M E N T**

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Next it is important to understand the objections of the individual. What concerns do they have about using the services? What issues do they have? What barriers and obstacles do they perceive? Asking good questions will determine these objections, so that they may be addressed.

Finally, it's time to close the sale. This means moving to the next step in the intake process. By using these sales techniques, you will be better able to entice eligible individuals to enroll in your program.

### **SETTING EXPECTATIONS**

Since retention is your ultimate goal, it is important not to oversell the features, advantages, and benefits of the services you offer to potentially eligible individuals. Honestly presenting both the positive and the negative features, and painting a realistic picture of the program will serve your goals of retention.

### **KEEP IN TOUCH**

Another important issue in recruitment and retention is maintaining contact with participants. By establishing that you are committed to an on-going relationship, you will be able to better meet your program goals. This may also enhance your success at follow-up.

## PRINT MATERIALS FOR RECRUITMENT

Recruitment materials and tools include brochures, posters, newspaper and other print media advertisements, and door hangers. To be effective, they should be targeted to attract the hard-to-serve program participants you need for your program. Outlined here are some ideas for more effectively using these materials and tools to reach your recruitment goals.

### BROCHURES AND FLYERS

Targeted brochures are excellent for addressing the needs of specific target groups.



**IDEAS...**

**FOR  
CUSTOMIZED  
BROCHURES FOR  
TARGETED  
GROUPS**

The New Mexico Human Resources Development Institute (NMHRDI) offers one brochure, titled, "When layoffs are inevitable... WHAT DO YOU DO?"



Albuquerque/Bernalillo County Private Industry Council  
1701 Fourth Street, SW  
Albuquerque, NM 87102  
(505) 768-6050

The Private Industry Council of Northern Cook County is currently designing a recruitment campaign for seven targeted groups. The space for the text is blank and they are using in-house desktop publishing to create flexible, targeted materials that can be constantly updated for each target group.



The Private Industry Council of Northern Cook County  
2604 East Dempster Street, Suite 502  
Des Plaines, IL 60016  
(708) 699-9040

The state of Oregon has developed a brochure designed and targeted for potentially eligible women interested in non-traditional occupations. The brochure, disseminated among employers and women, conveys ideas that are two-fold. First, that potentially eligible women as heads of households will be assessed for interest and aptitude for non-traditional occupations, but most importantly, that the state has assumed the role of reversing institutional thinking about women in occupations that might be non-traditional (25% or less female). The desired outcome is to introduce women to careers that pay well.



Oregon JTPA Administration  
775 Summer Street NE  
Salem, OR 97310  
(503) 373-1995

## POSTERS

Posters can be targeted to the population you are trying to reach in two ways: the poster itself can be targeted (a poster that appeals to youth, for example, when youth are being targeted), or the posting site might be targeted (placing the poster on a school bulletin board, for example, when targeting youth). The poster may include a message that is appealing to a certain population, or, in the cases of targeting individuals with English as a second language, the poster may be in that native language. Targeting can also be accomplished by using a picture of a member of the targeted group (featuring a woman, for example, when groups of women are being targeted).

The Central Oklahoma Private Industry Council has targeted potentially eligible women through their poster, featuring a picture of a businesswoman, with the testimonial-approach heading, "JTPA helped me get back to work." The poster continues to provide a testimonial from the woman, stating, "JTPA may be able to help you too... for free!" The balance of the poster states:

"You may qualify for:

- Paid on-the-job training
- Free Vo-tech School
- Job placement

JTPA, It works! Call 235-JOBS"

Central Oklahoma has also developed a large four-color poster appealing to summer youth. The poster features a space-age view of the earth, with the headline, "Launch your future." A graphic of a ticket appears in the top right-hand corner, with the slogan, "JTPA reserved seat." A phone number is provided for interested individuals to call for more information.



Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102-2447  
(405) 297-2940



**IDEA...**

**FOR POSTER TO  
RECRUIT WOMEN  
AND SUMMER  
YOUTH**

## DIRECT MAIL

Direct mail reaches out to individuals in an intrusive way, and can present a message that sells candidates on the benefits of working with your program.

Mailing lists can be rented from a vendor (usually a mailing list company — look in the yellow pages under "Mail" or "Mailing") or from a club or association or can be borrowed from another service agency. Contact sister agencies (those with which you have an established relationship — or consider developing a relationship through your outreach activities) to share such resources.

## TIPS AND GUIDELINES

### TO ENSURE YOUR DIRECT MAIL PIECE IS READ

- Hand addressed mail is generally opened before a typed address, which is generally opened before mail with an address label
- First class mail is generally opened before bulk mail
- Mail sent in an envelope is generally read before messages appearing on postcards
- Avoid a "commercial" look—something that looks like a personal letter or invitation will appeal more than a mailer that looks like an advertisement
- Use a personal appeal with a message that is compelling to your audience



### IDEA...

**USING DIRECT  
MAIL TO  
RECRUIT OLDER  
WORKERS**

The Kitsap County Job Training Center has used direct mail to reach potentially eligible older workers. They were able to access a mailing list through the Washington State Employment Security Department's (WSES) JobNet. An electronic download of current JobNet registrants who were 55 years of age and older and non-caucasian was requested. Additional information regarding this direct mail campaign can be found in the section Working Examples.



Kitsap County Job Training Center  
3721 Kitsap Way, Suite 8  
Bremerton, WA 98312  
(206) 478-4620



## DOOR HANGERS

Door hangers are an excellent method of distributing recruitment messages through a specific community. They can be placed on doors directly by your organization through canvassing efforts, or can be placed via companies that distribute such advertisements for a fee.

## PRINT ADVERTISEMENTS

The Central Oklahoma Private Industry Council used a targeted approach in an advertisement that appeared in the Sunday *Oklahoman*. The ad was titled, "Don't take a layoff laying down" and featured a group picture representing the demographics of those served by their program. The ad continued to read:

"You can be back to work soon. Call for free personal help with:

- Job Hunting Workshops
- Training For New Jobs
- Job Leads
- Resume Writing
- Job Interview Skills

It's easier than you think. Call..."

A small disclaimer at the bottom of the ad read, "Eligibility Requirements Apply." The logo was shown, along with a slogan, "Our plan for you is WORKING."

Another targeted print advertisement used by the Central Oklahoma PIC was an ad placed in *El Nacional*. The ad uses the headline, "Lance su futuro," and continues to say, "en el Programa Juvenil de Empleo y Entrenamiento de Verano del Alcalde." The ad continues to read:

"Jovenes de 14 - 21 años de edad. Solicitantes deben de calificar bajo regulaciones de elegibilidad. Solicite en el Wodson Recreations Center."



Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102  
(405) 297-2940



**IDEA...**  
**FOR PRINT ADS**  
**TO RECRUIT**  
**DISLOCATED**  
**WORKERS**

## BULLETIN BOARDS

Posting notices on bulletin boards can be an inexpensive, yet highly targeted method to reach the individuals you want to attract. Consider the high-visibility locations for reaching potentially eligible individuals listed to the right.

## BILLBOARDS

Highway billboards are considered one of the most efficient mediums when used to support a radio, newspaper, or television campaign. You can target your message both geographically and demographically and it has the lowest cost per audience. However, your audience only has 5 to 12 seconds to read the message, and it therefore requires frequent viewing and very limited content in its message. Ads are often limited to large pictures and ten or less words.

In addition to highway billboards, you may also want to investigate the use of alternate billboards, including electronic billboards at sporting events and portable billboards.

To produce a billboard, contact one of the outdoor billboard companies listed in the yellow pages. Ask them for their rates and their preferred method of production. Some companies have in-house designers, some have signs that require mechanicals and can only use handpainted signs, while others use a new process requiring photography. Usually the billboard companies sell billboards on a 12 month contract. Shorter terms can be purchased but the rates per billboard increase significantly.



### BULLETIN BOARD LOCATIONS

- community bulletin boards
- high schools
- grocery stores
- laundromats
- banks
- social service offices
- pharmacies
- libraries
- restaurants
- halls
- bowling alleys
- race tracks
- sporting arenas

## ADVERTISING MEDIA FOR RECRUITMENT

Developing creative and compelling recruitment messages can be extremely helpful in recruiting targeted individuals to your program.

Recognize the Equal Employment Opportunity requirements that communications with visual/hearing impaired be as effective as with others; that reasonable steps be taken to provide information in appropriate languages; and that an EEO acknowledgment be included on pamphlets, manuals and other materials distributed to the public.

### HOW TO WRITE HEADLINES AND COPY

Ideally, all written recruitment messages will compel the reader — the potentially eligible individual — to respond to your advertisement. How can you make all messages more attractive? First, some basics on writing advertising headlines and copy, and on designing the ad.

**Headlines.** The advertisement headline should immediately attract the reader's eye. It should be strong, simple, and direct, using powerful words to draw the reader to your ad. Use of the word "you" is proven to be highly successful in attracting readers.

**Copy.** Specifics outsell generalities, so remember to be as specific and targeted as possible in detailing who you are attempting to attract. The copy of the advertisement should be detailed, and written from the "you" point of view. Testimonials and endorsements are powerful in appealing to the reader, in that these approaches most mimic word of mouth advertising, and show the reader "what's in it for me."

In writing your advertising copy, consider that image advertising will result in fewer recruits as opposed to a direct recruitment piece. In other words, advertisements that discuss the services offered by your program will be less effective for recruitment purposes than a direct appeal to apply for services.

Writing in the present tense is best, as it places the ad copy in a positive framework, as if the individual had already responded to your message.

Realize that qualifiers will reduce your response. Qualifiers are those statements that demonstrate the need for a specific background, age, or other characteristic. While your program cannot serve all individuals, realize that by adding qualifiers you may also be discouraging eligible individuals.

Examples of qualifiers include:

- "If you have..."
- "Must have..."
- "Minimum of..."
- "...Mandatory"
- "...Helpful"

## HOW TO DESIGN ADS

Advertisement design should be clear, concise and easy to read. Use of contrast, such as white lettering on a black background, is conspicuous on a page full of advertising or in a poster display. Typeface should be large, and should contain both upper and lower case to make it easy to read (it is more difficult for the eye to scan all upper case lettering). A serif style typeface is preferred (consult your printer for more information). Coupon-style ads are appealing, as are borders. White space will permit the advertisement to stand out on a page.

**Developing your recruitment messages.** Strong recruitment messages incorporate the following ingredients:

- ▶ A catchy opening or title,
- ▶ Lots of "you" language,
- ▶ Explanation of "what's in it for me,"
- ▶ Features, advantages, benefits,
- ▶ Explanation of how the person is to react/respond, and
- ▶ Specific benefit for responding within a certain time period.

## USING RECRUITMENT ADVERTISING AGENCIES

Recruitment advertising agencies work just like travel agencies do in coordinating your air travel. Travel agents receive a commission from the airlines when they book your flight, and the air fare is no more expensive for you than if you booked your ticket directly with the airlines. Similarly, most recruitment advertising agencies receive a commission from the newspaper when they place your recruitment advertisement, and you pay no more for the advertisement.

Why use recruitment advertising agencies? Going back to our travel agent analogy, travel agents, because of their knowledge of the airlines, can sometimes save you money, offer you special benefits, suggest a better flight schedule or route, and in short, make your travel not only more comfortable but more cost effective. Similarly, recruitment advertising agencies are extremely familiar with newspaper options, special features offered by newspapers, and other information not available to you. They may be able to suggest ways to reduce your recruitment costs. Additionally, they can assist you in designing a compelling message that will attract the individuals you are targeting.

How can you find recruitment advertising agencies? Look in your telephone book, or consult with your local human resources association for a local, regional or national firm that can meet your needs.

Realize that not all recruitment advertising agencies work in the same ways. Ask questions, gain references, and determine not only the types of services they can perform for you, but also the associated charges for additional services.

## USE OF TELEVISION, RADIO AND PUBLIC SERVICE ANNOUNCEMENTS

Television and radio reach a large percentage of those potentially eligible individuals you wish to attract. Public Service Announcements (PSAs) offer you a no-cost way to utilize these mediums.

Additionally, many radio and television stations offer "bulletin board" programs at no cost to advertisers, especially in areas where unemployment is high and this service is seen as a benefit to their audiences. Many cable television channels offer bulletin board programs with opportunities to advertise at a minimal cost. Check with your local stations for additional information in accessing these popular and high-visibility mediums.

There may also be opportunities to make appearances on radio and television talk show programs, especially when you have something newsworthy to share with the station's audience. Newsworthy topics might include:

- a Summer Youth or Older Worker Program orientation date,
- a human interest story on a particularly successful placement,
- a recruitment event being sponsored by your organization, such as an open house or job fair,
- co-recruitment activities with a large (or high visibility) local employer,
- a new service being offered, and
- a new location, an addition of a new staff member, or anything else new or different.



**IDEA...**  
**FOR USING**  
**RADIO TO**  
**ATTRACT OLDER**  
**WORKERS**

In Bozeman, Montana, they have been doing some heavy recruiting of older workers because they have had a difficult time in attracting them to their program. They decided to work closely with a local radio station they had identified as having a large following of older adults, and bought some time during the news just before the Paul Harvey program, which is very popular with that target audience. Since that time they have been receiving many calls from people 55 years of age and older. Through this strategy they met their participant goals.

For additional details, refer to the section on Working Examples.



District IX Human Resources Development Council  
321 East Main Street, Suite 300  
Bozeman, MT 59715  
(406) 587-4486



## R E C R U I T M E N T

In Sacramento, California, they are using bilingual radio stations to reach Spanish-speaking listeners. Information regarding employment services is broadcast over a network of bilingual radio stations by La Cooperativa Campesina de California in Sacramento, California. Additional information on this initiative is outlined in the Working Examples section.



La Cooperativa  
2102 Capitol Avenue  
Sacramento, CA 95816  
(916) 442-4792

### NEWSPAPER ADVERTISING

Newspaper advertising is another way to reach potentially eligible individuals. Ads in the help wanted section of the newspaper offer a reliable means to reach those actively looking for employment. Advertisements can be placed as column ads for a lower cost, or as display ads for higher cost and higher visibility.

Advertisements can also be placed in other sections of the newspaper in most metropolitan areas. There are some papers, however, that do not permit employment advertisements to be placed in sections other than the classified section—check with your local paper for details. This may entice some eligible participants who may be discouraged workers who are not actively seeking employment.

Different sections of the newspaper may be targeted depending upon the audience you want to attract. For example, placing an ad in the grocery store section on coupon days may provide a way to target women. Advertisements near the obituary section of the newspaper are a proven method to reach older readers.



**IDEA...**  
**FOR USING**  
**NEWSPAPER AD**  
**SUPPLEMENTS**

The Central Oklahoma Private Industry Council made use of another newspaper advertising option: an informative newspaper supplement. The supplement was titled, "Who can help me get a job that's got a future? We can." In addition to the kinds of services offered by the PIC, the supplement featured two success stories: Geneva Pinnock and Wendell Smith, two recent program participants. Pictures of Geneva and Wendell were shown, with a narrative describing their situations and how JTPA services had helped each of them. Geneva's section included a testimonial, applauding the services offered to her. Geneva is a black female, and Wendell is a white male. Additional information on this campaign is in the section of Working Examples.



Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102  
(405) 297-2940



**IDEA...**  
**FOR USING**  
**BILINGUAL**  
**RADIO**  
**MESSAGES**

## **R E C R U I T M E N T**

The Lake County Private Industry Council uses the media to publicize a number of PIC-sponsored events, including the job fair described in the earlier section, and other events, such as their annual JTPA/PIC Alumni Breakfast. Several newspapers carried stories describing this awards event, which also related a success story regarding a JTPA "alum" who was being honored at the event. While not a direct recruitment effort, this type of publicity is an effective way of telling others about the services offered by your program.



The Private Industry Council of Lake  
County  
415 Washington Street  
Waukegan, IL 60085  
(708) 249-2200



**IDEA...**  
**FOR FEATURING**  
**JTPA ALUMNI**  
**IN ADS**

Many PICs have developed their own publications that often contain direct recruitment messages. *Success*, a newsletter published by the Private Industry Council of Lake County, offers articles on award breakfasts, new PIC services, and other news articles.

In their Fall 1992 issue, while discussing the results of their recent summer youth program, they encouraged those with questions for next year's program to call for more information. They also announced their efforts to better serve area workers who are age 55 or over by providing vocational training for pursuit of a new career field or updating skills. A telephone number was offered for interested candidates or referrals.



## ***SERVING HARD-TO-SERVE GROUPS: A FOCUS ON TARGETED RECRUITMENT***

In the previous sections, a detailed listing of ideas for recruitment has been highlighted. Once you have gained some ideas for what kinds of recruitment activities, materials, messages, and sales presentations you might develop, the next step is using these ideas in a targeted method.

You can reach your targeted audience through several different paths: the medium, the message and pictures. The medium that you select should target the group or individual you wish to attract; for example, if you place posters in a retirement community, you will likely attract older adults. Likewise, when you place a print advertisement in an Hispanic publication, by virtue of the medium, you are targeting the population you wish to attract.

Messages that you use will appeal to certain groups. For example, by stressing the ability to learn world of work skills, you may be appealing more to a youthful audience. Similarly, by discussing the availability of child care services you will appeal to young mothers. Testimonials are another way to target your message: by using a quote from an Hispanic woman, or from an older man, you attract similar individuals who connect with that ad and think, "if that individual can be helped, so can I."

Using pictures of individuals representing the age, gender, ethnicity, and racial background of those you wish to target will also send a message that these are the groups of individuals you hope to serve. Consider all pictures used in newspaper and other print advertising, television and video productions and other recruitment materials and literature.

For every group you wish to target in your recruitment efforts, consider that there is not only the primary market you wish to target, but a secondary market. The primary market is the individual being directly recruited. The secondary market is comprised of "pass along" and "influencer" markets — those individuals who may refer or pass along recruitment literature or information, and those individuals who influence the decision-making of the primary market.

For example, if you wish to target youth, your primary market is the potentially eligible youth. However, there are several other groups who may influence the decisions of this primary market. School teachers, counselors, parents, and friends are all groups of individuals who may have some ability to influence the primary target, or may be able to pass along information or directly refer the individual to your service.

Consider this secondary target market for recruitment efforts:

- |                                                               |             |
|---------------------------------------------------------------|-------------|
| ➤ other service agencies and employment and training programs | ➤ pastors   |
| ➤ schools of all kinds                                        | ➤ spouses   |
| ➤ parents                                                     | ➤ friends   |
| ➤ teachers                                                    | ➤ children  |
| ➤ counselors                                                  | ➤ neighbors |

## AFDC RECIPIENTS

Develop relationships with other agencies and service providers to best recruit members from this group. Also, appeal to women by thinking about the activities in which women participate on a regular basis. Consider the following targeted activities:

- advertise in the newspaper near the grocery store ads on coupon days,
- display posters in laundromats, grocery stores, pharmacies, and other places frequented by women,
- advertise in bargain shopper publications, such as the "Thrifty Nickel" and the "Penny Pincher,"
- offer a special information seminar especially for women entering or re-entering the workplace, with child care provisions,
- conduct an open house or other recruitment event which permits those who have concerns about returning to work to explore the opportunities and the services that you offer,
- conduct a joint recruitment event with other service agencies providing services to this group, including displaced homemaker programs,
- advertise on the radio or television during noon-day programs,
- stress child care opportunities in all print advertisements,
- depict women in the workplace in all advertising campaigns, and
- use testimonials from women who have successfully utilized program services.

## DROPOUTS

This is a harder-to-reach group since language skills may be limited, and since many drop-outs have severed linkages with the local schools. Here are some ideas to target this hard-to-serve population:

- work with school counselors and teachers to develop a network of professionals who can assist your efforts,
- promote programs in the schools, through posters, announcements, and flyers, and encourage students to recommend friends,
- display posters and other recruitment messages in "hang-outs,"
- use radio messages to reach this hard-to-reach group,
- consider door-to-door canvassing,
- develop initiatives to link with parents—important youth "influencers," and
- develop a task force of youth to help target more drop-outs.

Further, according to Sec. 265 of the Act, SDAs are required to establish appropriate linkages and coordination procedures with other federal programs and with appropriate education and training

## **R E C R U I T M E N T**

agencies. These agencies must be described in the SDA job training plan. The requirements for youth under this part, formal agreements established with local educational agencies, must specify at a minimum:

- (1) The procedures for referring and serving in-school youth;
- (2) The methods of assessment of in-school youth; and
- (3) Procedures for notifying the SDA when a youth drops out of the school system.



**IDEA...**

**FOR TARGETING  
AT-RISK AND  
DISADVANTAGED  
YOUTH**

To target and recruit the disadvantaged and at-risk young people in Palm Beach County, the Palm Beach County PIC has developed a collaborative project with the School Board of Palm Beach County called "Positive Connections." To recruit youth, referral sites are blanketed with brochures and posters. Previous years' participants are also sent information directly. More information on this recruitment strategy is outlined in the Working Examples section.



Palm Beach County Private Industry Council, Inc.  
600 South Dixie Highway  
West Palm Beach, FL 33401  
(407) 659-5213

Also, refer to the previous section on Referrals and Task Forces for a case study on the Youth Employment Institute in Portland, Oregon.

### **INDIVIDUALS WITH DISABILITIES**

The best strategy in recruiting people with disabilities is to develop outreach strategies with service agencies and schools providing services to this group. To augment recruitment efforts, consider the following:

- develop a special open house targeted at individuals with disabilities,
- conduct an information seminar focused on the needs of people with disabilities, either for these individuals specifically, or for service providers, parents, or teachers,
- provide recruitment messages which permit access by individuals who are hearing impaired, including a TDD number,
- use a variety of messages, including radio and television, to permit access by individuals who are vision-impaired, and
- depict people with disabilities in recruitment literature.





## R E C R U I T M E N T

The Computer Program Training for the Disabled in Oklahoma City, Oklahoma, was part of a national effort by IBM. JTPA joined this cooperative effort with Goodwill Industries, the Department of Human Services, Vocational Rehabilitation, IBM, and the private sector to provide training for the severely physically disabled in their community. Vocational Rehabilitation, a division of the Oklahoma Department of Human Services, provided adaptive aids as well as the participant pool. JTPA provided assessment, intake, and supportive services for the participants.

As a result, the trainees were mainstreamed into unsubsidized employment. To date, 15 participants have completed training and thirteen have been employed at annual salaries ranging from eighteen to twenty-eight thousand dollars.



The Computer Training Program for the Disabled  
Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102  
(405) 297-2940



**IDEA...**

**FOR A  
COMPUTER  
PROGRAM  
TRAINING FOR  
THE DISABLED**

## **MINORITIES**

Every minority group requires a unique recruitment targeting strategy. For example, African Americans might respond to messages that may not appeal to Hispanics, which may not attract Native Americans, and so on. Even in targeting one Hispanic group, be aware that your recruitment efforts may need to be targeted. For example, one urban SDA shared that they almost made a disastrous mistake when they failed to understand the differences in dialects in Puerto Rican Spanish, Cuban Spanish, and Mexican Spanish. Tailor and target specifically to meet your participation goals.

Different minority groups may be targeted in the following ways:

- hold a recruitment event especially for African Americans, Hispanics, Asian-Americans, or other targeted groups,
- use pictures of minority individuals in all recruitment literature (refer to the previous section on newspaper advertising for an example of a picture used to target African American women),
- target recruitment messages by using the first language in the advertisement,
- use testimonials of successful minority individuals,
- develop door-to-door canvassing campaigns in ethnic neighborhoods (refer to the earlier section on door-to-door canvassing efforts for Hispanic individuals by the PIC's East County Employment and Training Center in Gresham, Oregon),
- work with community-based agencies providing services to minorities,
- use ethnic and community newspapers to advertise,

## R E C R U I T M E N T

- place advertisements on ethnic radio and television stations, and
- develop contacts with local places of worship for reaching minority and ethnic groups (refer to the previous section on Places of Worship for additional information on targeting efforts by the PIC's East Council's Employment and Training Center in Gresham, Oregon).



### **IDEA...**

#### **FOR SERVING NATIVE AMERICAN RESERVATIONS**

In North Dakota, four Native American reservations are being served by having one staff person assigned to each reservation. Here, recruitment takes place through personal contact and networking. The staff person keeps in constant contact with the reservation leaders, and the needs of the community. The offices are open five days a week and are busy recruiting and referring participants. In July through September 1992, they registered 516 individuals, referred 276 individuals to social services, made 1,111 job referrals, placed 162, and initiated 65 job development contracts.



Job Service of North Dakota  
PO Box 1537  
Bismarck, ND 58502-1537  
(701) 224-2836

### **IN-SCHOOL, BEHIND GRADE LEVEL**

Working closely with the school system can be one of the best ways to target in-school youth behind grade level. Outlined here are some ideas in reaching this group:

- work closely with school teachers and counselors,
- offer information seminars targeted at parents,
- create a task force of youth,
- place posters on school bulletin boards,
- advertise in the school newspaper,
- make announcements on school PA systems,
- use testimonials from last year's successful youth "graduates,"
- advertise on radio programs targeted for youth,
- offer an information fair on school premises, and
- create a recruitment event by having a high-profile speaker talking to youth with a youth message.



## R E C R U I T M E N T

The Private Industry Council of Lake County co-sponsored a youth event featuring Drew Brown, a former Navy jet pilot and speaker. His speech, titled, "Education Plus Hard Work Minus Drugs Equals Success and The American Dream," was given at two local high schools and immediately captured the interest of the students with the words of rap star Hammer's hit tune, "Too Legit To Quit." His message: stay in school, work hard, stay away from drugs, and you can be successful. He made a brochure available through the schools which lists sources for help, and salaries for various jobs and their educational requirements.

In addition to the important message being relayed directly to the students attending, the message was emphasized in media coverage of the event, including articles in the *News-Sun*.



The Private Industry Council of Lake County  
415 Washington Street  
Waukegan, IL 60085  
(708) 249-2200



**IDEA...**  
**FOR REACHING**  
**YOUTH WITH**  
**CONTEMPORARY**  
**MESSAGES**



**IDEA...**  
**FOR TARGETING**  
**AT-RISK HIGH**  
**SCHOOL**  
**STUDENTS**

The Cuyahoga County Department of Employment Services in Cleveland, Ohio, uses press releases and media advisories about their Youth Entrepreneurship Success Strategy (YESS) program, targeted for at-risk high school students ages 14 - 18. The positive coverage by television, radio, daily and weekly newspapers generated participant interest for recruitment purposes.



Cuyahoga County Department of Employment Services  
Division of Employment and Training, SDA 21  
1641 Payne Avenue, Room 330  
Cleveland, OH 44114  
(216) 987-8503

Also, refer to the section on Referrals and Task Forces, for a case study on the Youth Employment Institute in Portland, Oregon.



## EX-OFFENDERS

The best way to target this group is to work closely with parole officers and programs offering transitional services to ex-offenders.



**IDEA...**

**FOR SERVING  
PAROLEES AND  
EX-OFFENDERS**

Clackamas County (Oregon) Community Corrections served 2,000 parolees and probationers in 1990, with offenders coming from federal and state penal institutions, the County Jail, and a local residential work release center. Dedicated and experienced staff of Employment, Training, and Business Services of Clackamas County (ETBS) understand the unique challenges of this population, and often work hours that will accommodate the clients. ETBS' job developers often call joint staffing meetings with the appropriate partner agencies to assure case management with continuity from provider to provider, and often do referrals for Corrections, to sidestep the refusals that sometime face parole or probation officers trying to line up services for their clients.

In the past year, Community Corrections' referrals to ETBS added up to more than 179 felons and 70 misdemeanors, or 12 percent of the Corrections' total annual caseload. The partnership that has formed between parole and probation officers and ETBS's small staff has become so successful in its job-placement outcomes that word-of-mouth now has many additional referrals piling up from nearby local jurisdictions and federal institutions. Word-of-mouth (among parole officers, as well as parolees) even penetrates penal institutions outside of Oregon, and ETBS staff take calls from people months away from parole who want to get in line for services.



The Private Industry Council of Clackamas County, Inc.  
Employment, Training, and Business Services Division  
PO Box 215  
Marylhurst, OR 97036  
(503) 635-4591

Project RIO, a program initiated by the Governor of Texas, working in direct coordination with JTPA, developed a plan for the offender and ex-offender by identifying and recruiting participants while still in prison. Brochures were distributed, and flyers sent out and left at appropriate offices and agencies such as Texas Rehabilitation, Vocational Guidance Services, substance abuse treatment centers, and other agencies. For more information on this program, refer to the Working Examples section.



Houston Works  
1919 Smith, Suite 500  
Houston, TX 77002  
(713) 654-1919



**IDEA...**

**FOR A PROGRAM  
TO HELP  
RE-INTEGRATE  
EX-OFFENDERS**

## HOMELESS

Target the homeless by using the following strategies:

- work with homeless shelters to provide information to service providers,
- offer intake services at homeless shelters, and
- use canvassing campaigns to reach groups of homeless people.



**IDEA...**

**FOR VOICE MAIL  
TO REACH  
WORK-READY  
HOMELESS  
ADULTS**

Using a voice mail system for work-ready homeless adults, the Belltown Homeless Employment Project in Seattle, Washington, has developed a unique program to meet the needs of work-ready homeless adults. The program features Community Voice Mail, which assigns each participant their own telephone number with a voice system that collects telephone messages from potential employers, case workers, and others. They also offer a telephone room for individuals to make work-related calls. Because of the popularity of the program, the program has a waiting list of interested individuals.

Initially, targeted individuals were recruited by direct canvassing, and through referrals from all other social services providers. Since the program's initiation, it has gained national recognition on CNN and the *Today Show*.



Belltown Homeless Employment Project  
2106 2nd Avenue  
Seattle, WA 98121  
(206) 464-6414

## SKILLS DEFICIENT

Skills-deficient individuals may be unable to read recruitment messages, so consider audio messages, including radio and television, to reach this hard-to-serve population.

La Cooperativa reaches skills-deficient farm workers — largely Spanish-speaking—through the radio and telephone. An extensive network of bilingual radio stations provides contact information and details regarding employment services to listeners. They also have a voice-activated, 24-hour-a-day, 7-day-per-week telephone system which is capable of receiving calls and providing information. This system was installed in 1990 and is currently receiving two million calls per year. More information on this program is highlighted in the Working Examples Section.



La Cooperativa  
2102 Capitol Avenue  
Sacramento, CA 95816  
(916) 442-4792



**IDEA...**

**FOR REACHING  
SKILLS-  
DEFICIENT FARM  
WORKERS**





## OLDER WORKERS

Older workers may be targeted by using the following strategies:

- posting recruitment literature at pharmacies, nutrition centers, and senior centers,
- advertising near the obituary section of the newspaper,
- depicting older adults in all recruitment literature,
- offering a "second-career fair" focusing on the needs of older adults,
- advertising on radio and television programs with a strong older adult following (refer to the program information offered in the previous section on Radio, Television, and Using PSAs),
- using testimonials from older adults in recruitment literature,
- advertising in publications geared for older adults (often offered by senior centers),
- conduct an information fair, with other information available for older adults (nutrition, transportation, Social Security, and other information),
- working with other service providers offering services to older adults, including displaced homemaker programs, and
- direct mail to potentially eligible candidates (see direct mail letter targeting older workers in the previous section on Direct Mail).



### **IDEA...** **FOR RECRUITING** **OLDER** **WORKERS**

During the evaluation of older worker program services at the Job Council in Medford, Oregon, an employment specialist realized that there was low participation by older workers. Believing the older workers are an asset to the communities, and that calling them "older workers" does not encourage them to come in, she quickly changed the name to Oregon Treasures Program for Workers 55-Plus and worked on the design of the program brochures.

The brochures are titled, "The Job Council Oregon Treasures Program for Workers 55-Plus," and features a treasure chest graphic.

Additional information on this recruitment brochure can be found in the Working Examples Section.



The Job Council  
3069 Crater Lake Avenue  
Medford, OR 97504  
(503) 776-5100



## **PREGNANT/PARENTING YOUTH**

This group may be targeted in similar ways as those who are still in school. Remember also to work closely with health service providers for identification of those needing employment services.

Refer to the previous section on Referrals and Task Forces for a case study on the Youth Employment Institute in Portland, Oregon.

## **RURAL RECRUITING**

There are special needs for rural recruiting. Often, services are offered over a large geographic area, with limited staff to serve this area. "Doing more with less" is the slogan for rural recruiters. Service providers report that much of the contact with potentially eligible individuals in rural areas is done one-on-one, similar to selling a product. Staff in areas of South Carolina report going door-to-door to accomplish rural recruiting. Among approaches used by Idaho for recruiting older workers in rural areas are: including information about the older worker program in the electric power bill sent to customers and households; banks, post offices, and grocery stores are used as places to put targeted messages in rural areas; and free health screening, such as blood pressure and cholesterol tests, are sometimes used as incentives for coming out to hear about the program. The Governor of Idaho declares an "Older Worker Week" for the State, then holds a reception for individuals who come in to hear about services available. Prior to this event, service provider staff place announcements about the events in rural area coffee shops and restaurants. When targeted recruitment encompasses rural areas, it is wise and maybe necessary to carefully schedule staff time since there could be one-on-one and travel time to diverse geographical areas.



**IDEA...**  
**FOR REACHING**  
**ELIGIBLE**  
**GROUPS IN**  
**RURAL AREAS**

Throughout the State of North Dakota, staff recruiters are assigned a territory, and each recruiter makes contact with potentially eligible groups through advertising in the local newspapers regarding their visit to that community. In effect, these individuals act as walking Job Service Offices. The staff person personally speaks at local schools serving drop-outs, at-risk youth, and pregnant and parenting teens.



Job Service of North Dakota  
PO Box 1537  
Bismarck, ND 58502-1537  
(701) 224-2836

## ► MANAGING THE RECRUITMENT FUNCTION

### HOW TO BEGIN—MAKING A PLAN

Recruitment activities should not be conducted until an analysis has been completed on the groups to be targeted for recruitment purposes. Further, an outreach strategy should also be completed so that the appropriate image and reputation has been developed within the community, to enhance and support recruitment efforts. Integrating this information into your marketing plan will ensure an organized strategic approach.

When recruitment activities are implemented without an integrated plan, often the effectiveness of activities is minimized. By orchestrating the various elements of the recruitment plan in advance, all resources, including money, staff time and other resources may be maximized.

Once you have determined which group you will target for recruitment purposes, a complete strategy for reaching those groups should be developed. The plan must consider the desired flow of applicants to intake. Timing the recruitment effort to program intake needs is very important. Questions to ask include:

- What are the activities in which the target market participates on a daily basis?
- What television and radio programs are most appealing to this group?
- Does this group read the newspaper? If so, what sections?
- Is this group actively seeking services, or are they reluctant users of the services being offered?
- What places does the target market frequent?
- What other services are offered to this target market? Is there an opportunity to work more closely with these services?
- Does this group live in a certain geographic area?
- Can this group be reached through places of worship?
- Can this group be identified on some sort of mailing list?
- What are the reading skills of the target market?
- Are there any particular barriers for this group?
- Who are the "influencers" for this group?

Once these questions are answered, then specific recruitment activities may be selected. When considering targeted recruitment activities, select two or more activities to reach this group to maximize

## **R E C R U I T M E N T**

the effectiveness of the campaign. For example, don't rely on just one method — say, newspaper advertising — to reach your market.

After two or more recruitment activities are selected, you will then need to consider what recruitment materials and tools may be needed to support your activities. For example, if you have decided that direct mail is an excellent method to reach your audience, then a direct mail piece — a letter, brochure or flyer — will need to be developed. Again, remember that the more targeted your materials, the more effective they will be. Consider developing unique recruitment pieces that will genuinely appeal to and attract different target groups.

Once materials that are needed for recruitment are identified, the actual recruitment theme should be developed. Examine the benefits that will appeal to this target group. Consider these questions:

- What does this target market need most?
- What is this group's motivation for work?
- What are the barriers to the target market's exploration of services offered by your program?
- What information is needed to make your program's services appealing?
- What do most individuals from the target market perceive to be the benefits?

Next, determine what you will use as your "selling presentation" to individuals from the target market when they inquire about services. Have you examined how you will sell potentially eligible individuals on the benefits of working with your program?

By answering the questions in this sequential fashion, you will then have the framework for a strategic recruitment action plan that will be more likely to meet your recruitment goals.

## **BUDGETING**

In addition to tracking results to determine how you might maximize your recruitment dollars, you should analyze if there are opportunities to use budget dollars from others to fund your recruitment activities. Consider joint recruitment efforts with these groups:

- Employers
- Schools
- Community-based agencies
- Other employment and training programs

There are employers who may be anxious to attract members of a target population, and may find it appealing to work closely with you to recruit many individuals. Further, consider other service agencies that may want to attract similar target groups, and would be willing to share the cost of such activities.

## R E C R U I T M E N T

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If you really want to orchestrate a recruitment activity, purchase recruitment materials, or plan a recruitment event but are concerned about costs, consider the following:

- Are there others with whom you may barter for services or materials?
- Can you offer a benefit to a group that may be willing to provide funds or materials?
- Are there free services offered in the community?
- Can you find a co-sponsor?
- Do you know of someone who might be willing to underwrite the expense, or a portion of the expense, for a little publicity?

Be imaginative! Be creative! Talk to others about your goals and see how they might be able to support your plans.

*Costs associated with recruitment are generally considered to be training-related costs.*

### STAFFING

Just as you will want to use creative strategies for funding recruitment efforts, you will want to think creatively about how you can accomplish your recruitment plans given your current staffing levels. Whether you have a small or large staff, you can achieve your goals by considering these methods to staff recruitment events and activities:

- Can you find a co-sponsor for an event?
- Can another agency provide staff?
- Are there others with whom you can barter for staffing services?
- Can you offer a benefit to a group in exchange for assistance on a project?

Instead of saying, "We can't accomplish this goal because of our small staff size," instead ask, "How can we accomplish our goal by involving others in the community?"

### MANAGING INTERAGENCY REFERRAL

Under Section 628.510 (b) of the Regulations, eligible individuals should receive information on the full array of services available through the SDA and its service providers, including information for women about opportunities for non-traditional training and employment. Also, under (d) of this section, the Regulations state that during the intake process, determinations may be made prior to enrollment to refer an eligible applicant to another human service, training or education program deemed to be more suitable for the individual. SDAs are further asked under Section 620.510 (e) (3) to develop appropriate mechanisms to assess applicants referred by service providers and describe such mechanisms in its Job Training Plan.

The language of the Act clearly states the expectation for referrals of eligible applicants to the appropriate agency for needed services if JTPA services are not appropriate or available. It is logical to



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think that the process will also work in reverse and other agencies with linkages to the SDA will want to refer clients to the SDA when their own services are inappropriate to match the needs of their client. How to manage the referral process, thus managing one aspect of the applicant flow, needs consideration as recruitment plans are being developed. Managing interagency referral arrangements (via agreements) is a very important aspect of managing the overall applicant flow process and meeting enrollment goals for targeted groups.

Interagency agreements can be a vital aspect of building a strong foundation of community and specific agency awareness for how an SDA serves and the range of services available through JTPA. This is integral to the definition of outreach — developing awareness and establishing a foundation for future recruitment needs. These arrangements alone will result in a flow of applicants to the SDA. Therefore, it is incumbent upon the SDA to get a fix on the impact of agreements. If too many applicants (especially too many non-targeted applicants) are directed to JTPA intake by other agencies, then the SDA needs to tailor the provisions for referral (e.g., refer only after calling first, limiting the referral rate per month, allowing only agencies which serve targeted individuals to refer) to better meet intake flow needs. In a sense, this action might be called anti-recruitment, i.e., discouraging the selling of the program.

When the flow of applicants from normal referral arrangements is inadequate to meet enrollment goals for targeted groups, targeted recruitment is called for and the agencies that have reciprocal arrangements are a great place to start. They already know about the program and its services and they may have ready a pool of persons who need JTPA services. Their facilities would also be available to post recruitment messages or hand out flyers, brochures, and other literature. A good example can be found in services to dislocated workers. UI serves as a general referral source to a local EDWAA program; however, should a special project be funded for a plant closure, UI will often assist in active recruitment by including program service information in the envelopes with UI checks.

## **EVALUATION**

After each recruitment strategy has been completed, take the time to thoroughly evaluate the plan to determine how it might be improved. Some evaluative questions to ask include:

- How could the strategy be improved?
- What was extremely effective?
- What was not effective?
- What steps should be changed or modified?
- What elements should remain the same?
- Is there a way to obtain the same results with less money, time, or effort?
- Is there a way to significantly improve the results with more money, time, or effort?
- Should the strategy be repeated?
- If this strategy should be repeated, how often, when, and where?

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Successful targeted recruitment strategies do not happen by chance. They are the result of a carefully integrated plan that is meshed with program goals and objectives. Through the use of a targeted recruitment strategy plan, developed as a result of targeting and outreach planning, your program can achieve its aggressive goals to serve the community.

One of the most important elements of analyzing the relative success and failure of your recruitment efforts is tracking recruitment results. Many programs make the mistake of assuming that what is cheap is best, when actually, dollars may be thrown away on inexpensive yet ineffective recruitment activities. For example, you may be spending almost no money on one recruitment activity, but you may find, after analysis, that the activity yields almost no eligible individuals. Or you may also find that a recruitment activity that is relatively expensive to orchestrate may actually offer such superb results that the expense is justified.

To determine cost and effectiveness, it is necessary to have a process that tracks how many participants enrolled as a result of recruitment efforts. For each recruitment activity, add all expenses involved in the event, and divide by the number of eligible participants enrolled to determine the cost per recruit. In this way you may compare recruitment activities to determine which activities yield the best results.



## ► WORKING EXAMPLES OF RECRUITMENT

Working examples for recruitment abound in JTPA! In the following pages, we offer you a variety of ideas from programs all across the country — large and small, rural and urban. We hope you'll find some creative ideas about funding your recruitment efforts, partnering activities and reaching hard-to-serve groups to attract them to your program. Your colleagues have shared the success stories in hopes that you'll borrow their ideas or call them for more information about specifics on implementing these strategies!

- Job Fair Sponsored by PIC of Lake County and the Chicago Tribune
- Recruiting gang-affected and at-risk youth
- Using direct mail to recruit older workers
- Using newspaper to recruit targeted groups
- Brochures to attract older workers
- Recruiting the older worker over the radio
- Recruiting women for non-traditional jobs
- Summer Youth Program flexibility to serve 14-15 year olds and the older 16-21 aged youth
- Native American Outreach Program

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### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**      **Job Fair Sponsored by PIC of Lake County and the Chicago Tribune**

**ORGANIZATION:**    The Private Industry Council of Lake County, with the co-sponsorship of the Chicago Tribune  
Waukegan, Illinois

**CHALLENGE:**      To attract a broader range of potentially eligible JTPA individuals to their program in a cost-effective manner

**DETAILS:**            The staff and board members of the Private Industry Council of Lake County felt that the PIC's message needed to reach a broader range of both job seekers and businesses. Although PIC staff felt that a large scale event such as a job fair would meet these goals, such an event seemed beyond their financial and staffing capabilities. Therefore, the PIC of Lake County joined forces with the Chicago Tribune, one of the midwest's oldest and best known daily newspapers, to co-sponsor the Lake County Job Fair.

The Tribune classified advertising staff proposed that the Tribune do a special classified advertising campaign devoted to Lake County area employers. Employers who purchased advertising during that campaign would receive, as a bonus, a booth at the Lake County Job Fair. The PIC's role in the fair would be to assist the Tribune in identifying employers who were interested in participating, helping find a site for the event, promoting the event to Lake County residents, and providing staff assistance on the day of the fair.

The event was held at the Lake County Area Vocational Center, one of the PIC's subcontractors, thus eliminating the expense of having to rent a facility. The PIC's only expenses, other than staff time preparing for and participating in the fair, were for printing some flyers and doing some advertising in other newspapers.

More than 2,500 applicants attended the first Lake County Job Fair, and 35 employers accepted resumes and conducted initial interviews. A follow-up survey conducted by the Chicago Tribune indicated that of those attendees, approximately 250 made first contacts with companies, which lead to employment.

The PIC received excellent press coverage from both the Chicago Tribune, which regularly displayed the PIC's name as the fair co-sponsor, and from other area newspapers, which carried press releases and advertising. The PIC also utilized radio and television public service announcements, placed posters and flyers at the local employment and public aid offices, some area grocery stores, and alerted human service agencies to the job fair.



## RECRUITMENT

### WORKING EXAMPLES TO CONSIDER

The following ad appeared in the Bargainer publicizing the job fair event:

#### JOB FAIR SET JUNE 18 IN GRAYSLAKE

Area workers will have the opportunity to make contact with dozens of area employers Thursday, June 18 at a job fair at the Lake County Area Vocational Center in Grayslake.

The fair is co-sponsored by the Private Industry Council of Lake County (PIC) and the Chicago Tribune.

'We are very pleased to be involved in this event again this year (the fair is in its second year),' said Chris Stevens, PIC's executive director. 'Last year 35 employers exhibited at the job fair, and we expect more this year.'

Last year the fair drew nearly 3,000 applicants. This year, a new service will be made available: PIC staff members will offer a 10-minute resume critique session between 10 a.m. and 2 p.m.

'Staff members will offer suggestions for improvement, as well as passing along interview tips and other information,' Stevens said.

Hours for the fair are 10 a.m. to 4 p.m.; the location is just north of the College of Lake County. For more information, call (312) 222-1616 or (708) 249-2200.

#### BUDGET:

The PIC's grand total for expenses was approximately \$300.

#### RESULTS:

The PIC's first job fair was so successful that a second job fair was scheduled with the same sponsors and location. At this fair the PIC staff set up a resume critiquing clinic to assist job seekers and heighten the PIC's exposure during the fair. A third fair is already being investigated.

#### CONTACT:



The Private Industry Council of Lake County  
415 Washington Street  
Waukegan, IL 60085  
(708) 249-2200



## RECRUITMENT

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**      **Recruiting gang-affected and at-risk youth**

**ORGANIZATION:**    The Private Industry Council, Youth Employment Institute (YEI)  
Portland, Oregon

**CHALLENGE:**      Initiating a start-up effort to recruit a hard-to-serve client group — gang-affected and at-risk youth

**DETAILS:**            With a network including the welfare system, juvenile court system, the housing authority and community-based organization, especially those involved with youth and/or gang task forces, the Private Industry Council's Youth Employment Institute in Portland, Oregon, has had great success in targeting gang-affected and at-risk youth. While YEI currently depends quite heavily on word-of-mouth as a primary recruitment tool, staff originally did a lot of footwork in establishing a network of referral sources.

In initiating a targeted start-up effort for gang-affected and at-risk youth, staff felt that establishing contacts with referring agencies was critical to leveraging program staff's ability to identify prospective program participants. Typically, such a network would include the welfare system, the juvenile court system, the housing authority and community-based organizations, especially those involved with youth and/or gang task forces. Donald Foster, Youth Advocate, cautions that if local law enforcement is utilized in identifying gang-affected or at-risk youth, staff need to send a clear message to youth that the program itself and staff are not affiliated in any way with the police or any other law enforcement entities.

Once identified, the staff emphasized the significance of making one-on-one contacts with targeted youth to establish personal relationships and a level of trust as part of the recruitment process. Often this activity takes place in the youth's home, on the streets or in other areas where youth can be located. While this method is fairly staff intensive at the onset, it has produced significant results for the program. YEI currently has a far greater demand for services from this population than resources permit.

Additionally, as the program has established an identity within the community, graduates and current program participants have been responsible for generating a significant number of referrals to the program, making word-of-mouth a significant means of recruiting new participants from the target population.

**CONTACT:**



The Private Industry Council, Youth Employment Exchange (YEI)  
1704 NE 26th Avenue  
Portland, OR 97212  
(503) 280-1058

## R E C R U I T M E N T

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** Using direct mail to recruit older workers

**ORGANIZATION:** Kitsap County Job Training Center  
Bremerton, Washington

**CHALLENGE:** Reach potentially eligible older workers

**DETAILS:** The Kitsap County Job Training Center has used direct mail to reach potentially eligible older workers. Securing a mailing list through the Washington State Employment Security Department's JobNet database allowed a download of those current registrants who were 55 years of age and older and were non-caucasian.

The letter sent to job seekers is provided here:

Dear Job Seeker,

You have been referred to us as a person who may be potentially eligible to participate in one of the most successful employment and training programs ever offered to those 55 years of age and older. Yes, there is a job training program just for the mature worker who needs help finding a job in today's labor market.

Our office address is 3721 Kitsap Way, part of the Kitsap County Job Training Center, located in West Bremerton. What we do best is help older workers find full-time or part-time employment. In today's labor market it's sad to report that many employers face labor shortages even with a ready and qualified workforce of Seniors who have a lot to offer: maturity, stability, a solid work ethic and years of experience.

If you are 55 years of age or older, unemployed and need help finding a job or are in need of job training, you now have a place to go! The Kitsap County Job Training Center can provide job placement assistance, resume development, on-the-job training, vocational skills training, temporary work experience and limited financial support services.

A lot of people ask the question: "How much will it cost?" The answer is nothing. There are no charges for these valuable services if you can qualify. The Kitsap County Older Worker Program is an equal opportunity job training program funded by the Job Training Partnership Act (JTPA) and sponsored by the Olympic Private Industry Council.

To find out more about how this program can help you find the job or get the job training you need, pick up the phone today and call (206) 478-4620. There is no obligation. Call now! Tell your friends. I'll be waiting to hear from you.

Sincerely,

Kitsap County Older Worker Program Counselor

## RECRUITMENT

### WORKING EXAMPLES TO CONSIDER

**RESULTS:**

While this effort is in its early stages, last year's mailing resulted in an abundance of telephone calls and enrolled several participants. Similar results are expected for this year's mailing.

**CONTACT:**

Kitsap County Job Training Center  
3721 Kitsap Way, Suite 8  
Bremerton, WA 98312  
(206) 478-4620

## WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** Using newspaper to recruit targeted groups

**ORGANIZATION:** Central Oklahoma Private Industry Council  
Oklahoma City, Oklahoma

**CHALLENGE:** Attract targeted labor market segments

**DETAILS:** The Central Oklahoma Private Industry Council made use of another newspaper advertising option: an informative newspaper supplement. The supplement was titled, "Who can help me get a job that's got a future? We can." In addition to the kinds of services offered by the PIC, the supplement featured two success stories: Geneva Pinnock and Wendell Smith, two recent program participants.

Pictures of Geneva and Wendell were shown, along with a narrative describing their situations, and how JTPA services had helped each of them. Geneva's section included a testimonial, applauding the services offered to her. Geneva is a black female, and Wendell is a white male.

This page begins with a quote from Geneva which reads, "JTPA helped me reach a dream that would otherwise have been impossible."

*Geneva's story:*

"Geneva Pinnock is an extraordinary person. A mother of ten, Geneva reached a dead-end in 1986. She had no job and worst of all, no hopes of getting one soon. Suffering from low self esteem, Geneva was dangling at the end of her rope when a friend told her about JTPA and The Central Oklahoma Private Industry Council.

She scored so high on her skills assessment test, JTPA professionals advised her to immediately enroll in college. Within only a matter of days, Geneva found herself briskly walking to class on the campus of Oklahoma City Community College pursuing an associate degree in secretarial science. JTPA paid for her books and tuition, plus covered her gasoline and related expenses.

Geneva is now completing her studies at University of Central Oklahoma, expecting to graduate soon with a bachelors degree. She's happy.

In Geneva's words, 'JTPA opened the door for an entire family to come off the welfare roll and onto the taxpayer's roll.'"

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#### *Wendell's story:*

"Like so many other Oklahomans, Wendell Smith was a victim of the oil boom and bust cycle. Laid off in 1986, just two days before the cost of a barrel of oil tumbled below \$15.00, Smith found himself hopelessly staring a bleak future squarely in the eyes.

The unemployment office referred Wendell to the dislocated worker program. Wendell started attending classes at Francis Tuttle Vo-Tech Center. When the dislocated worker program ran out of funds, JTPA intervened, paying for the rest of Wendell's school.

Today Wendell Smith earns over \$30,000 a year as a respiratory therapist. He says of JTPA that it 'saved his life.' Wendell's future is bright."

#### CONTACT:



Central Oklahoma Private Industry Council  
One North Walker Avenue  
Oklahoma City, OK 73102-2447  
(405) 297-2940



**WORKING EXAMPLES TO CONSIDER****EXAMPLE: Brochures to attract older workers**

**ORGANIZATION:** The Job Council  
Medford, Oregon

**CHALLENGE:** During the evaluation of older worker program services at the Job Council in Medford, Oregon, an employment specialist realized that there was low participation by older workers.

**DETAILS:** Believing that older workers are an asset to the communities, and that by calling them "older workers" they are not eager to come in, she quickly changed the name to Oregon Treasures Program for Workers 55-Plus and worked on the design of the program brochures.

The brochures, titled "The Job Council Oregon Treasures Program for Workers 55-Plus," feature a treasure chest graphic. Inside, the brochure copy reads:

"Webster's dictionary defines treasure as 'Something of great worth or value.' This accurately describes the people 55 and older who are served by The Job Council's Oregon Treasures Program. If you are in this age group and seeking employment, The Job Council will help you assess your skills, overcome any employment-related obstacles, and realize your employment goals."

Key headings include:

- ▶ The Job Council is Working For You
- ▶ How to Get Started
- ▶ Additional Education or Job Training
- ▶ Attend Our Job Seeker's Seminar
- ▶ Join a Job Club
- ▶ Begin Your Job Search with Us

The brochure also depicts an older worker.

**CONTACT:**

The Job Council  
3069 Crater Lake Avenue  
Medford, OR 97504  
(503) 776-5100

**WORKING EXAMPLES TO CONSIDER****EXAMPLE: Recruiting the older worker over the radio**

**ORGANIZATION:** Career Transitions (displaced homemakers, JOBS Programs in Gallatin and Park County Montana, Livingston Job Services and Bozeman Job Services, District IX Human Resources Development Council.  
Bozeman, Montana

**CHALLENGE:** The Older Worker Program in Bozeman, Montana, had been experiencing great difficulty in recruiting their target group and meeting their participant goals.

**DETAILS:** Working closely with a local radio station, this JTPA program operator focused on airing Older Worker Program information on a radio show the older worker might listen to. They bought air time during the news, and just before Paul Harvey — who it appears is very popular with the targeted group. Local coordination occurred to serve the older population. Monthly meetings are held to coordinate activities and work cooperatively among the agencies. The older worker is always referred to the appropriate agency for any of their needs.

**RESULTS:** After initiation of the radio ads for the Older Worker Program, phone calls from interested clients 55 and older increased substantially. Last year District IX's participant goal for 55 and older was reached.

**CONTACT:** District IX Human Resources Development Council  
321 East Main Street, Suite 300  
Bozeman, MT 59715  
(406) 444-4500



## WORKING EXAMPLES TO CONSIDER

**EXAMPLE: Recruiting women for non-traditional jobs**

**ORGANIZATION:** Montana Job Training Partnership Administration (which administers two PICs in Montana), NET Project Team, Women's Opportunities and Resource Development (WORD), the statewide Displaced Homemakers Network, WOW, Inc., The Ford Foundation, AETNA Insurance Company.

**CHALLENGE:** A few years ago, at a joint council meeting in Montana, the Balance of State Private Industry Council and the County Commissioners of the 46 County Consortium of Montana confirmed that although the executive summary or annual status report read that the year-end overall JTPA performance in Montana was excellent, there were marginal performance results in their service to women. A strategy was necessary to decrease the 71 cent disparity in average wage at placement between males and females, recruit more women into JTPA, improve services to women, and raise the average wage at placement figures.

**DETAILS:** The council looked to develop statewide support for training women in non-traditional occupations, turn around the disparity in the average wage at placement, and recruit women into the programs. Montana JTPA partnered with the Non-traditional Employment Training Team to target, recruit and increase services to women. The NET Team started in Missoula and then expanded the project statewide. The NET team's goals are to increase the SDA's overall average wage at placement for women through training for non-traditional jobs. The targeted occupational areas in Montana are carpentry, highway construction, transportation occupations, trucking, facilities maintenance, painters, utility workers, mechanics, postal workers, police officers, firefighters, electro-mechanics (copy machine repair, computer repair) and sewer occupations.

The NET Leadership Team is comprised of Native Americans Representation, local governments, public employment service, human services agencies — specifically family services programs — jobs programs, community resources such as child care, local and state education, including vocational education, organized labor, community based organizations, departments of transportation, PIC members and local elected officials, a representative from every JTPA service provider in the area, and local employers.

The NET Team trained JTPA service providers on how to target, recruit and serve women. Previously, service providers just placed the women without concrete training; therefore, they were not successful and the retention rate was low. Realizing that pre-vocational training, support services after placement, physical conditioning and tool identification were essential elements to retention, the programs were designed to meet those needs. Much of Montana is a vast rural area

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with limited opportunities for women. This program and the coordination with other agencies was imperative to the success of women in their workforce.

Materials designed and printed for this program included recruitment brochures for women and brochures targeting employers. A working video was developed for recruitment of women into non-traditional occupations, and a video guide was developed to accompany the tape — curriculum development is under way to use with the video. Sample materials are available upon request.

#### RESULTS:

In 1992, 20 Montana women were trained as truck drivers and survey aides. 75 percent of the participants are currently employed with wages ranging from \$5.00 an hour to \$19.00 an hour, plus benefits. Only through the cooperation of local communities and program operators was it possible for these women to attend training and find employment in their communities. These women are now able to support their families.

#### CONTACT:



Montana JTPA  
101 North Last Chance Gulch  
Helena, MT 59601  
(406) 444-1330

## RECRUITMENT

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Summer Youth Program flexibility to serve 14-15 year olds and the older 16-21 aged youth**

**ORGANIZATION:** Toledo Area Private Industry Council, Toledo Area Public Schools, Planned Parenthood, City of Toledo Youth Commission, Toledo Area Ministers Alliance, Local Social Service Agencies, as well as the American Red Cross, United Way and local businesses and organizations  
Toledo, Ohio.

**CHALLENGE:** In Toledo, Ohio, the Summer Youth Employment Office traditionally offered assistance only to youth aged 16-21. Uniquely, because of the very high number of youth between the ages of 14 and 15 that originally apply for the summer program, they now target and recruit the age group of young people 14 and 15. In the Toledo area there is an extremely high unemployment rate of 22.1 percent for youth aged 14-21. The challenge has been to provide services that meet the needs and interest of all the ages between 14 and 21, keeping the youth interested in the program and helping them complete the program and stay in school or return to school.

**DETAILS:** Target and recruit 14-15 year old youth and design a more flexible program. The Summer Youth Employment Offices has worked hard to design a program geared toward ages 14-21. A program that offers basic skills and life skills to the younger group aged 14-15, keeping them excited about staying in or returning to school while offering meaningful employment to the youth aged 16-21. Working with community businesses and agencies to find work beyond litter control and landscaping, they customize the program to meet the needs of the person. During intake, the youth fills out an interest form which tells the counselor in which direction to encourage the youth — if they are interested in animals, they work with the Toledo Zoo. For recruitment, they offer incentives for the young people to apply to the program, giving the applicants food coupons, movie passes, and t-shirts with logo. The youth are identified, targeted and recruited in coordination with the public school system, local social services agencies such as Planned Parenthood, Alcohol and Drug Rehabilitation Centers and local churches. Sample recruitment brochures are available.

**RESULTS:** During the Summer Youth Employment and Training Program in 1992, 1,600 youth were enrolled in work experience and 300 in basic education. Approximately 95 percent completed the program.

**CONTACT:** Toledo Area Private Industry Council, Inc.  
Summer Youth Employment and Training  
331 14th Street  
Toledo, OH 43624  
(419) 241-1277





**WORKING EXAMPLES TO CONSIDER****EXAMPLE: Native American Outreach Program**

**ORGANIZATION:** Job Service of North Dakota, Bureau of Indian Affairs, Indian Health Services, Tribal Employment Rights Office and Tribal JTPA  
Bismarck, North Dakota

**CHALLENGE:** In rural North Dakota, recruiting Native Americans into job training programs and providing outreach to the Native American communities, informing them of the extensive job training services that are available and successful in the area has always been a challenge.

**DETAILS:** The purpose of the Native American Outreach Program is to enhance employment and training opportunities on or near the four Indian reservations in the state and recruit and screen for JTPA programs. An office on each reservation has a staff person who provides on-site services which include: basic employment services; recruitment and screening for JTPA programs, Summer Youth Program and recruitment for Job Corps; job insurance, providing information on claims and in several locations also take job insurance claims; maintaining on-going contact with the tribal council and giving basic information regarding available services. Recruitment occurs through personal contact; speaking in the schools and at community gatherings; and newspaper ads and flyers.

**RESULTS:** Reports from last year show that 516 Native American participants registered, 276 were referred to social services, 1,111 job referrals were made, 162 were placed. The outreach that occurred in the Native American communities was essential and could only have been achieved by on-site attention.

**CONTACT:** Job Service of North Dakota  
PO Box 5507  
Bismarck, ND 58502  
(701) 224-2774



## ► CITATIONS FOR RECRUITMENT

### JOB TRAINING PLAN

Sec. 104.(b) Each job training plan for the programs conducted under title II shall contain -

(6) procedures for identifying and selecting participants, including -

- (A) goals for the training and placement of hard-to-serve individuals, and a description of efforts to be undertaken to accomplish such goals;
- (B) outreach efforts to recruit and expand awareness of training and placement opportunities for such individuals; and
- (C) types of services to be provided to address the special needs of such individuals;

(9) a description of -

- (B) the process for providing information and referrals for applicants and participants relating to appropriate programs and service providers;

### GENERAL PROGRAM REQUIREMENTS

Sec 141(g)(3)

(B) Each on-the-job training contract that is not directly contracted by a service delivery area with an employer (but instead is contracted through an intermediary brokering contractor) shall, in addition to meeting the requirements of subparagraph (A), specify the outreach, recruitment, participant training, counseling, placement, monitoring, followup, and other services to be provided directly by the brokering contractor within its own organization, the services to be provided by the employers conducting the on-the-job training, and the services to be provided, with or without cost, by other agencies and subcontractors.

### ELIGIBILITY AND SERVICES - ADULT

Sec 203.(b) Hard-To-Serve Individuals. Not less than 65 percent of the participants in the program under this part, other than participants served under section 204(d), in each service delivery area shall be individuals who are included in 1 or more of the following categories:

- (1) Individuals who are basic skills deficient.
- (2) Individuals who are school dropouts.

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(3) Individuals who are recipients of cash welfare payments, including recipients under the JOBS program.

(4) Individuals who are offenders.

(5) Individuals with disabilities.

(6) Individuals who are homeless.

(7) Individuals who are in a category established under subsection (d).

(c) Special Rule. - Not more than 10 percent of participants in a program assisted under this part, other than participants served under section 204(d), in each service delivery area may be individuals who are not economically disadvantaged if such individuals are age 22 or older and within 1 or more categories of individuals who face serious barriers to employment. Such categories may include the categories described in subsection (b), or categories such as displaced homemakers, veterans, alcoholics, or addicts.

### **PROGRAM DESIGN - ADULT**

Sec. 204.(a) Essential Elements. -

(2) Additional Requirements. -

(A) Information and Referrals. - Each service delivery area shall ensure that each participant or applicant who meets the minimum income eligibility criteria shall be provided -

(i) information on the full array of applicable or appropriate services that are available through the service delivery area or other service providers, including those receiving funds under this Act; and

(ii) referral to appropriate training and educational programs that have the capacity to serve the participant or applicant either on a sequential or concurrent basis.

(b) Authorized Services. - Subject to the limitations contained in subsection (c), services that may be made available to each participant under this part may include -

(2) training-related and supportive services, including -

(B) outreach to make individuals aware of, and encourage the use of, employment and training services, including efforts to expand awareness of training and placement opportunities for limited-English proficient individuals and individuals with disabilities;

(C) outreach, to develop awareness of, and encourage participation in, education, training services, and work experience programs to assist women in obtaining non-traditional employment, and to facilitate the retention of women in non-traditional employment, including services at the site of training or employment;

(E) dissemination of information on program activities to employers;

(G) programs coordinated with other Federal employment-related activities;

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### **ELIGIBILITY AND SERVICES - YOUTH**

Sec. 263.(b) Hard-To-Serve Individuals Who Are In-School Youth. - Not less than 65 percent of the in-school individuals who participate in a program under this part shall be individuals who are included in one or more of the following categories:

- (1) Individuals who are basic skills deficient.
- (2) Individuals with educational attainment that is 1 or more grade levels below the grade level appropriate to the age of the individuals.
- (3) Individuals who are pregnant or parenting.
- (4) Individuals with disabilities, including a learning disability.
- (5) Individuals who are homeless or run-away youth.
- (6) Individuals who are offenders.
- (7) Individuals within a category established under subsection (h).

(d) Hard-To-Serve Individuals Who Are Out-Of-School Youth. - Not less than 65 percent of the out-of-school individuals who participate in a program under this part shall be individuals who are included in 1 or more of the following categories:

- (1) Individuals who are basic skills deficient.
- (2) Individuals who are school dropouts (subject to the conditions described in section 264(d)(2)).
- (3) Individuals who are pregnant or parenting.
- (4) Individuals with disabilities, including a learning disability.
- (5) Individuals who are homeless or run-away youth.
- (6) Individuals who are offenders.
- (7) Individuals within a category established under subsection (h).

(e) Exceptions. - Not more than 10 percent of participants in a program assisted under this part in each service delivery area may be individuals who do not meet the requirements of subsection (a)(2) or (c)(2), if such individuals are within one or more categories of individuals who face serious barriers to employment. Such categories may include the categories described in subsections (b) and (d), or categories such as individuals with limited-English language proficiency, alcoholics, or drug addicts.

### **PROGRAM DESIGN - YOUTH**

Sec. 264.(a) Year-Round Operation. - The programs under this part shall be conducted on a year-round basis. Services shall be made available on a multi-year basis as appropriate.

(b) Essential Elements. -

(2) Additional Requirements. -

## **R E C R U I T M E N T**

(A) Information And Referrals. - Each service delivery area shall ensure that each participant or applicant who meets the minimum income eligibility criteria shall be provided -

- (i) information on the full array of applicable or appropriate services that are available through the service delivery area or other service providers, including those receiving funds under this Act; and
- (ii) referral to appropriate training and educational programs that have the capacity to serve the participant or applicant either on a sequential or concurrent basis.

(c) Authorized Services. - Subject to the limitations contained in subsection (d), services which may be made available to youth with funds provided under this part may include -

(2) training-related and supportive services, including -

(A) the services described in section 204(b)(2);

### **NON-DISCRIMINATION AND EQUAL OPPORTUNITY RULES**

29 CFR 34.6(a). Recipients shall take appropriate steps to ensure that communication with beneficiaries, applicants, eligible applicants . . . and members of the public with disabilities, are as effective as communications with others.

29 CFR 34.23(b)(1). In recruitment brochures and other materials which are ordinarily distributed to the public to describe programs funded under JTPA or the requirements for participation by recipients and participants, recipients shall indicate that the JTPA-funded program or activity in question is an "equal opportunity employer/program" and that "auxiliary aids and services are available upon request to individuals with disabilities." Where such materials indicate that the recipient may be reached by telephone, the materials shall state the telephone number of the TDD or relay service used by the recipient, as required by § 34.6.

29 CFR 34.23(b)(2). Recipients required by law or regulation to publish or broadcast program information in the news media shall ensure that such publications and broadcasts state that the JTPA-funded program or activity in question is an equal opportunity employer/program (or otherwise indicate that discrimination in the JTPA-funded program or activity is prohibited by Federal law), and indicate that auxiliary aids and services are available upon request to individuals with disabilities.

29 CFR 34.23(d). A significant number or proportion of the population eligible to be served or likely to be directly affected . . . may need service or information in a language other than English in order that they be effectively informed of or able to participate in the JTPA-funded program or activity. In such circumstances, the recipient shall take reasonable steps . . . to provide to such persons, in appropriate languages, the information needed; . . .



## **R E C R U I T M E N T**

29 CFR 34.23(e). As provided in § 34.6, the recipient shall take appropriate steps to ensure that communication with individuals with disabilities are as effective as communications with others.

### **HIGHLIGHTS OF COMMENTS SECTION OF INTERIM FINAL REGULATIONS**

Sections 104(b)(6) and (13), 121(b)(3) and 122(b)(5)-(7) of the Act require the States and SDAs to set goals and report on program accomplishments. The Department expects that each State's and SDA's plans and activities will reflect the development of outreach and promotional materials and/or activities aimed at making women aware of the programs and the services available through JTPA, particularly of non-traditional training and placement opportunities. Examples of outreach materials include, but are not limited to, non-traditional career information modules, video and print materials on non-traditional career options (for counselors), recruitment brochures targeted at both the client and the employer, and dissemination of preexisting resource materials and/or model curricula. States may also wish to undertake statewide public education campaigns, similar to those conducted for literacy programs, on non-traditional training and employment opportunities.

The regulations at §628.530 specify the requirements for referral of eligible applicants for whom available Title II services are not deemed suitable to appropriate human service programs in the community. A significant change in this section allows the SDA to assess eligible applicants, before they are enrolled as participants. The purpose of this pre-participation assessment is to enable SDAs to make more precise judgments as to the suitability of the applicant for participation in JTPA and/or additional services. In these cases, the assessment activities may be charged to the training-related activities cost category. The responsibility at this point in the intake process is to assure that eligible applicants not suitable for Title II participation are "provided information on the full array of applicable or appropriate services that are available..." (Section 204(a)(2)(A) of the Act) and make necessary arrangements for individuals to make contact with those services.

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# G R E A T T O R I D E A S



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## ► GREAT TOR IDEAS

*We offer you this chapter on Great TOR Ideas as a "Quick Reference" of activities to consider for your program. Many have been mentioned in the Guide; but, we hope this format will help spark your imagination to think of yet more creative ways to get your message out to your various audiences!*



### POSTERS

Create a display poster including a tear-off pad with your phone number and post it everywhere!

|                                          |                                 |
|------------------------------------------|---------------------------------|
| Beauty and Barber Shops                  | Bowling Alleys                  |
| Public Libraries                         | Race Tracks                     |
| Bus Stations                             | Shopping Center Bulletin Boards |
| Photocopy Shops                          | Churches                        |
| Video Rental Shops                       | Schools                         |
| Community Swimming Pools                 | Housing Projects                |
| YW and YMCA's                            | Motor Vehicles Division Offices |
| Boys' and Girls' Clubs                   | Bus Shelters and Subways        |
| Park Concession Stands                   | Video Arcades                   |
| Laundromats                              | Legal Aid Offices               |
| Movie Theaters                           | Senior Centers                  |
| Food Co-Ops                              | Fast Food Restaurants           |
| Grocery Stores                           | Restaurants                     |
| Movie Theaters                           | Human Services Agency Offices   |
| Union Offices                            | Public Utilities Offices        |
| Doctors' Offices, Clinics, and Hospitals | Vocational Training Centers     |
| Pharmacies                               | Community Colleges              |
| Taverns                                  | Remedial Education Centers      |
| Skating Rinks                            |                                 |



**LOGO IDENTIFICATION**

- Take your logo out to the community in as many ways as possible. Use it to print the following as giveaways at job fairs, rewards for participants, school awards, staff retreats:
  - T-Shirts
  - Bumper Stickers
  - Buttons
  - Balloons
  - Note Pads
  - Pencils and Pens
  - Key Chains
  - Coffee Mugs
  - Baseball Hats
- Sponsor a city sports team — baseball, basketball, soccer.
- Ask grocery stores to print it on the back of cash register tape.
- Ask your local post office to make a special canceling stamp for use during Employment and Training Week.
- Have your logo made into a banner for:
  - High school career days
  - Open house at your office
  - Background for television press conferences and talk show appearances
  - Your annual meeting and project kick-off events
  - Hanging over main street during Employment and Training Week
  - Have it painted on the fence at your community baseball field





## DISPLAY ADVERTISING

- Design a display ad with your logo and program information and print the ad in:
  - Major Local Newspapers
  - Newspaper Supplements
  - School Newspapers and Yearbooks
  - Local "Shopper"
  - Speciality Tabloids and Magazines
  - Church Bulletins
  - Career Tabloids
  - Your Own Job Training Newsletter
- Have the display ads printed and folded as table tents for restaurants, senior centers.
- Ask your local fast food franchises to print your display ads on placemats, cups, napkins, bags.
- Print copies and have the display ads mailed as a flyer with:
  - Telephone Bills
  - Gas and Electric Bills
  - Cable TV Bills
  - Bank Statements
- Ask other human services agencies to distribute the ads with their checks or vouchers.
- Ask your congressional representative to include the ads in mailings to their constituents.
- Have them printed as postcards and mail them to select mailing lists.

## G R E A T   T O R   I D E A S

- Print the display ad on programs for:
  - Local Festivals
  - Sports Events
  - Home Shows
  - County Fairs
  - Community Theater
- Turn the ad into brochures or cards and put them on display at:
  - Doctors' Offices and Clinics
  - Libraries
  - Community Centers
  - Union Offices
  - Churches
  - Banks
  - High School Guidance Counselor Offices
  - Senior Centers
  - Training Institutions
  - Human Service Agency Offices
- Give the ads to your PIC and Board members for them to distribute through their networks.
- Use one as your yellow pages advertisement.
- Print them as door hangers.
- Print it on bowling alley score sheets and racing forms.
- Have them blown up for:
  - Side and back panels of public buses
  - Signs on top of taxis
- Have the ad painted on a sandwich board and recruit someone to walk it around at special events, set it up outside your office.
- Get your local dairy to print the ad on milk cartons.
- Have a sign painter reproduce the ads on bus stop and park benches.





## **MEDIA COVERAGE**

- Place feature articles in community and school newspapers. These can be success stories, special event announcements, and letters to the editor.
- Arrange to have announcements read over the public address system of the high schools.
- Appear as a guest on radio and television talk shows.
- Submit PSAs to radio and television stations.
- Send news releases to newspapers, radio and TV stations.
- Start a JTPA Alumni Success Story of the Week (or month) to feature in news stories.



## **EVENTS**

- If your organization holds fund-raisers (car washes, bake sales, etc.) give each customer literature about your service.
- Construct a float for a local parade.
- Hold an open house.
- Set up a booth at career day in high schools and local community colleges and at community and street fairs and community days.





## OTHER ACTIVITIES

- Have JTPA alumni and PIC members speak at senior citizen centers, Chamber of Commerce, Elks, Eagles, women's groups, Jaycees, high school assemblies, church group meetings, and other places. Hand out your brochure.
- Sponsor career workshops. Promote them heavily in targeted neighborhoods.
- Produce and distribute a newsletter that is specifically geared to participants — make it very short, use pictures and participant testimonials.
- Reward participants for referring their friends to your program.
- Create a JTPA Alumni Association and have an annual event to recognize them.
- Create an Ambassadors Program — include JTPA graduates and employers who can spread the good news of your program throughout your community. Feature them in events and display ads, and schedule speaking engagements for them.
- Ask JTPA alumni to speak to participant groups and potential participants.
- Create simple flyers featuring participant success stories and send them out with PIC meeting announcements, newsletters and general correspondence.



G R E A T   T O R   I D E A S

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NOTES



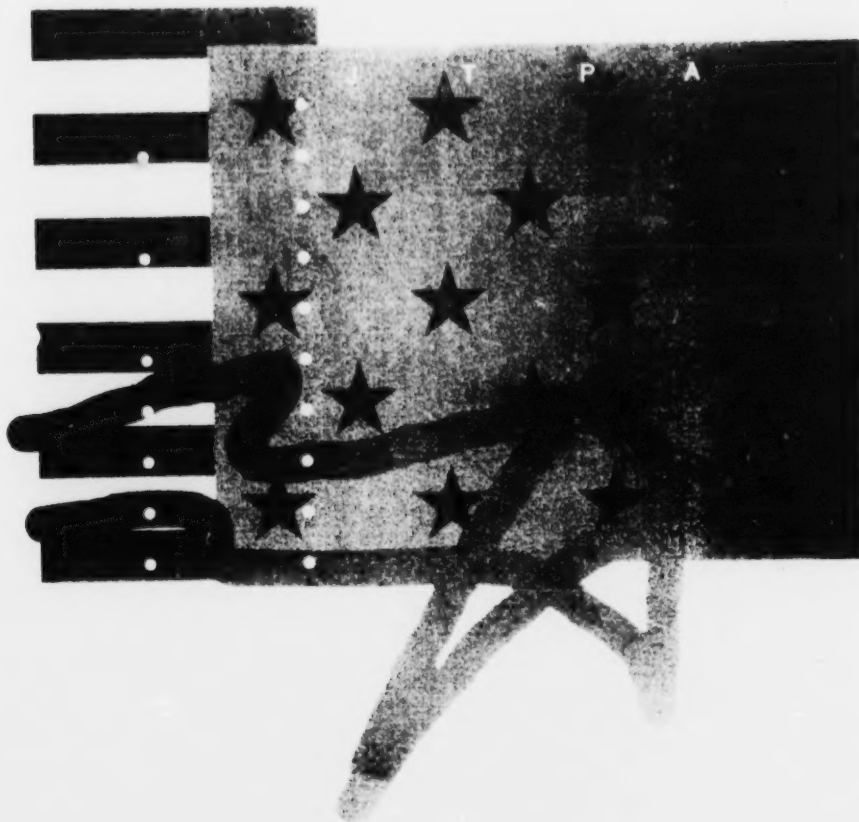
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PROJECT SPECIFIC  
EXAMPLES



## **PROJECT SPECIFIC EXAMPLES**

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## ► **INTRODUCTION TO PROJECT SPECIFIC EXAMPLES**

In our search for projects to share with SDAs in this Guide, we received many which dealt specifically with targeting, marketing, outreach, and recruitment activities. These are included in their respective chapters.

Many other examples were sent to us of entire programs — most of them joint efforts involving a number of local agencies and organizations, often instigated by the JTPA program.

We applaud these efforts and present them to you in this chapter.

### **ADULTS**

- Non-traditional Job Training Program for Adults
- Working with Older Workers

### **DISPLACED HOMEMAKERS**

- *YWCA Workplace*: A Project Serving Displaced Homemakers

### **EX-OFFENDERS**

- *Project RIO*: Re-integration of Ex-Offenders

### **HOMELESS**

- Homeless Initiatives Pilot Project

### **MINORITIES**

- Job Training for Native American Adults

### **MOST-IN-NEED AND HARD-TO-SERVE**

- *PPEP*: Portable Practical Educational Preparation, Inc.



## **PROJECT SPECIFIC EXAMPLES**

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### **YOUTH**

- ▶ *RAPS*: Resource Apprenticeship Program for Students — A year round youth apprenticeship and mentoring program that introduces young people to fields in natural resource management
- ▶ *SOS*: Survival Opportunities for Street Kids
- ▶ Youth Programs Focusing on Special Education and Handicapped Youth

### **OTHER PROJECTS**

- ▶ Center for Workforce Preparation
- ▶ Mississippi Delta Council for Farmworkers Opportunities



## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Non-traditional Job Training Program for Adults**

**ORGANIZATION:** The Northeast Women's Center  
Denver, Colorado

**DETAILS:** This project works with a varied group of women who are single parents — welfare recipients, displaced homemakers, ex-offenders, minorities (particularly Hispanic, and African- and Native American) — to introduce them to non-traditional job opportunities. The project has an 80 percent placement rate for participants in apprenticeship and trade positions which pay from \$7 to \$15 per hour.

**System Planning:** The Northeast Women's Center was already working with women from the above-noted hard-to-serve groups. They developed the project and chose to go after JTPA funding because they knew from their experience that women who were single parents needed to make a certain base amount of money to stay off welfare.

The project flows from the **mission** of the Women's Center which is to "provide women and their families with the opportunity to gain economic self-sufficiency through education and employment." The project's service design reflects this; services are tailored to the needs of the participants and to outcomes.

**Targeting:** The Women's Center employed various data sources to get a profile of community and target group(s) needs. Information was supplied by the Community College of Denver, Census, and a telephone survey which was conducted by Metro State College.

**Outreach:** The project works closely with the MiCasa Women's Resource Center, Empowerment Program for Ex-Offenders, Native American Indian Center, Colorado AFLCIO, and the greater Denver area business community.

General awareness activities include public service announcements, newspaper articles and presentations at local meetings and churches.

**Recruitment:** Focused recruitment activities include public service announcements and a day-long orientation/project overview.

**CONTACT:**



The Northeast Women's Center  
2247 Oneida Street  
Denver, CO 80207  
(303) 355-3486



## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**           **Working with Older Workers**

**ORGANIZATION:**   Wake County Job Training Office and Capital Area Private Industry Council  
Raleigh, North Carolina

**DETAILS:**           Capital Area Private Industry Council staff assist eligible older workers in their job search and refer them to other programs when appropriate. Program services focus on the clients between fifty-five and sixty-one years old. Participants are provided opportunities to learn how to translate past work and life experiences into marketable skills. A major element of this program is the linkage with other related agencies such as the Council on Aging, Veterans' Organizations, Department of Social Services and the Employment Security Commission.

***System Planning:*** The program design is in direct response to the mission of the Capital Area Job Training Consortium. The mission is to enhance the quality of life for those individuals facing barriers to employment by providing training and employment opportunities that will promote self-sufficiency and thus contribute to a more productive community.

***Targeting:*** The project began in an effort to meet the needs of older workers with serious barriers to employment in Wake, Johnston, and Harnett counties, North Carolina.

***Outreach:*** Linkages with older worker agencies, one on one, and a wide dissemination about services through multi media is the extent of outreach.

***Recruitment:*** Mostly one on one recruitment is done. By the time a potential client comes to the door, they more than likely know something about some of the services available. So it is then a matter of tapping interests and needs and getting them enrolled in the program.

**CONTACT:**           Wake County Job Training Office



PO Box 550  
Raleigh, NC 27602  
(919) 856-6040

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **YWCA Workplace: A Project Serving Displaced Homemakers**

**ORGANIZATION:** YWCA Workplace  
Great Falls, Montana

**DETAILS:** This project provides assistance to displaced homemakers, many of whom are older individuals. A wide range of services are offered, including counseling, job skills, work labs, skills upgrading and job search workshops. Volunteer mentors from the community, who represent entrepreneurs and various occupations, work with the participants to provide information on how to start a business and what occupations require in terms of skills. *YWCA Workplace* sponsors monthly or bimonthly mentor lunches where volunteers offer advice and explain how they became successful. Many of the mentors are displaced homemakers who have succeeded. The occupations include insurance, real estate, landscaping, interior design and small business. Current enrollment is 128. The project emphasizes community involvement for the volunteer mentors, provides older displaced homemakers with non-traditional options, and provides role models that emphasize the overcoming of barriers through individual initiative and effort. Participants improve self-esteem as well as job skills.

**System Planning:** The Statewide PIC has identified displaced homemakers as a primary target group for JTPA Title II-A services with major emphasis being placed on employment as an outcome. This group has been so identified since the mid-eighties because it is felt they have some unique characteristics that are differentiated from the general JTPA-eligible population, chief of which are the length of time they have spent out of the workforce and hence the need for honing of skills, and the sense of culture shock that frequently greets such participants in a diverse social and cultural atmosphere. Often because of the age of the participants, placements are not oriented toward career-ladder, entry-level positions but rather toward self-sufficiency wages as the goal. This often results in an identification that entrepreneurial training for self-employment is the more appropriate avenue to pursue. There is also effort made to find non-traditional jobs which have included such areas as a railroad engineer, dump truck drivers, surveyors, etc.

**Targeting:** Generally, data for this target group is not available. The SDA is waiting to see if Census data might capture this information or a surrogate for it. The National Displaced Homemaker Study of several years ago shows an approximate statewide total, but nothing with regard to local numbers. At this time, the SDA does not know how serious an impact this group represents, nor even how serious is their plight compared to other area groups.

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**Outreach:** The YWCA covers a five county territory in the Great Falls area and does outreach to displaced homemakers when conducting local community awareness drives. Also word of mouth is responsible for spreading awareness of the existence of the program.

**Recruitment:** Some active recruitment is done in conjunction with the community awareness drives.

**CONTACT:**



YWCA Workplace  
104 2nd Street South, Suite 200  
Great Falls, MT 59405  
(406) 727-0966

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**           **Project Rio: Re-Integration of Ex-Offenders**

**ORGANIZATIONS:** City of Houston — Houston Works, Houston Job Training Partnership Council  
Gulf Coast Trades Center  
Houston Community College  
Texas Rehabilitation Commission  
Texas Employment Commission  
Texas Department of Corrections  
Department of Human Services and other local social service agencies  
Houston, Texas

**CHALLENGE:** The City of Houston, Harris County, Texas receives the largest share of parolees in the State, and it is critical to reach and recruit them within the first six months of release in order to make permanent positive changes in their lives. Houston needed to offer ex-offenders a program that works! The recidivism rate in Texas is 33 percent, and to meet this challenge The Houston Job Training Partnership Council created a human investment strategy that placed a new emphasis on the targeted ex-offenders.

**DETAILS:** The Governor of Texas developed *Project RIO* (Re-Integration of Ex-Offenders) and Houston Works took the concept and enhanced it beyond job search into a comprehensive long-term program in order to make it work more effectively. The program design was expanded in partnership with the Gulf Coast Trades Center, which has extensive experience with ex-offenders.

*Project RIO* Phase II, working in direct coordination with JTPA, developed a plan for the offender and ex-offender when they returned to Harris County. Participants are identified and recruited while still in prison. While many have their own personal plan, the program is targeted, designed and available to any prisoners soon to be released, as well as those on parole and probation.

Recruitment starts at the Texas Department of Corrections site, parole offices and probation offices in Harris County. Brochures are distributed and flyers are sent out and left at appropriate offices and other agencies such as Texas Rehabilitation, Vocational Guidance Services, and substance abuse treatment centers. Coordination begins with as many social service agencies as possible to meet the full needs of the participant, allowing the participant to enter into a long-term program. Understanding that during a long-term program many issues and barriers occur, support systems are instigated with other agencies to offer services as necessary. Additionally, *Project Rio* participants have a mentoring program and ongoing support system within the program.

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

#### RESULTS:

Despite a recidivism rate of 33% in Texas, *Project RIO* Phase II has produced some astonishing results. Of the 250 ex-offenders who have enrolled in *Project RIO* Phase II over the past three years, two have earned associates degrees, 85 have been placed in jobs averaging \$6.50 an hour, 25 have earned GEDs, 18 have completed training, 59 are in training at community colleges, and 43 are working on their basic skills in preparation for college. Only 35 RIO participants have returned to prison and 28 others have dropped out for personal reasons, but may return to the program.

#### CONTACT:



Houston Works  
1919 Smith, Suite 500  
Houston, TX 77002  
(713) 654-1919



## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Homeless Initiatives Pilot Project**

**ORGANIZATION:** Seattle-King County Private Industry Council  
Seattle, Washington

**DETAILS:** The Homeless Initiatives Pilot Project's (HIPP) overall strategy is to increase employment and retention for homeless persons. HIPP is the product of a coalition of local partners who provide a variety of human services for homeless individuals and families. The HIPP coalition partners are: Seattle-King County Private Industry Council, YWCA of Seattle-King County, Seattle Conservation Corps, The Washington State Employment Security Department Homeless Employment Project, and the Homeless Education and Apartment Resource Training (HEART) Project. Coalition partners each contribute a range of resources and expertise, ensuring a continuum of employment and support services for homeless persons.

**System Planning:** Using a comprehensive case management strategy, the mission of the project is to:

- ▶ Emphasize employability development, job placement, job retention, stable housing, and long term self-sufficiency as desired outcomes;
- ▶ Develop effective services for homeless individuals and families who are at risk of chronic unemployment and homelessness;
- ▶ Provide a range of services to participants who lack basic skills, work skills and life skills necessary to secure and maintain employment and housing;
- ▶ Match training, housing, and other support services to the assessed need for such services.

The key assumption of the HIPP Program is that homeless participants who receive case management assistance within a service network comprised of education, training, housing, health and support services will be able to acquire stable employment and permanent housing.

To ensure the provision of client-centered, quality services for HIPP participants, the PIC has also made a commitment to staff development for both HIPP case managers, supervisory staff and PIC staff.

**Targeting:** The HIPP Project employed various data sources to get a profile of the homeless and their needs. Data sources include the State Department of Community Development report on Washington State Housing Needs, Bureau of the Census, U.S. Department of Housing and Urban Development, the Seattle-King County Coalition for the Homeless (made up of over fifty agencies which provide shelter and crisis-related services to homeless families and individuals, and personal interviews.

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

Annual evaluations of program operations and outcomes have also been used to refine the program.

**Outreach:** The project's Case Management Team Leader and case managers work closely with the Washington State Department of Social and Health Services, JOBS, emergency health services, Community Service Officers from the Police Department and with the local network of 22 shelters.

**Recruitment:** HIPP case managers have scheduled time on-site at each of the 22 shelters. Case managers provide group or individual orientations weekly and personal follow-ups, as needed, to answer questions and inform homeless individuals of available HIPP services.

#### CONTACT:



Seattle-King County Private Industry Council  
Market Place One, Suite 250  
2001 Western Avenue  
Seattle, WA 98121  
(206) 684-7390

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**      **Job Training for Native American Adults**

**ORGANIZATION:**    Michigan Indian Employment and Training Services, Inc.  
Holt, Michigan

**DETAILS:**          Michigan Indian Employment and Training Services, Inc., (MIETS) is a State-wide nonprofit organization designed to improve employment skills and opportunities for Native Americans. The primary purpose of MIETS is to recruit and assist Native Americans in their efforts to obtain gainful employment and become self-sufficient. MIETS operates eight field offices that provide services to a sixty-one county service area in the State of Michigan. All programs are administered through the central administration office located in Holt.

***System Planning:*** The desired outcome of this program is to provide one stop shopping for Native Americans from the recruitment process through assessment, enrollment, support services, training, to employment.

***Targeting:*** The program targets only Native Americans. In addition, the State has a provision that requires a participant be at least 1/4 or more Native American to receive free training at any public institution of higher learning.

***Outreach/Recruitment:*** The project works closely with local agencies and does much of the outreach through local Native American agencies, such as the Tribal Councils, Indian Child Welfare, Indian Health Services, and the Employment Skills Center. The Tribal Councils play an active role in the outreach and recruitment functions, making a large percentage of referrals to the program.

**CONTACT:**



Michigan Indian Employment and Training Services, Inc.  
2450 Delhi Commerce Drive, Suite 5  
Holt, MI 48842  
(517) 694-7800

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **PPEP: Portable Practical Educational Preparation, Inc.**

**ORGANIZATION:** Portable Practical Educational Preparation, Inc. (PPEP)  
Tucson, Arizona

**DETAILS:** PPEP is a multifunded, nonprofit corporation which provides a multitude of social services to hard-to-serve clients in rural areas. Some examples of these vital services include: affordable housing for migrant workers, necessary sewers and street enhancement, day-care sites, senior nutrition, and education and employment. The project has repeatedly demonstrated its resourcefulness in leveraging Department of Labor funds, direct student financial aid from the Department of Education, and local funding sources. PPEP is a successful program that strives to instill a sense of dignity and pride in the clients it serves, the majority of whom are economically disadvantaged.

***System Planning:*** PPEP originated as a portable "school on wheels" for farmworkers in 1967 with an old, green converted Chevy school bus appropriately dubbed "La Tortuga" or "The Tortoise" with a mission to provide a portable, practical approach to the educational needs of the itinerant farmworkers. PPEP was incorporated in 1970 with a mission "to improve the quality of rural life in Arizona" and has since grown to be one of the largest multi-service agencies in Arizona which serves rural areas. The project's emphasis is on assisting low-income rural residents through a holistic approach and a broadbased continuum of grassroots empowerment, advocacy, technical assistance, direct service provision and the facilitation of self-help projects.

***Targeting:*** PPEP conducted a farmworker survey from August, 1992 to January, 1993, documenting responses of 647 households, representing 2,207 people. The following is a summary of the responses:

89 percent are Hispanic. Just over half (59 percent) of the respondents speak English (with fewer reading and/or writing English) which indicates that a large portion of the farmworker population falls into the hard-to-serve category. The average size of household is 3.4 persons. Average family income is \$5,999 or 55 percent below the poverty level for a family of three. Of the 1,059 total males (including children), 12% lived alone with no one to support. 75 percent are field laborers; 51 percent lived in the area for less than 5 years; 52 percent wanted some type of training opportunity.

***Outreach:*** When PPEP initiates, often through local request, programs in a rural community, a community council is formed. The councils are organized as problem solving structures with a mission of developing a program or programs to meet local needs. Councils range from ad hoc groups and informal associations to actual incorporated bodies.



## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

PPEP also belongs to the Rural Telecommunications Initiative on HandsNet national computer bulletin board (BBS) and operates its own public access PPEP-NET BBS.

**Recruitment:** Using PPEP's statewide circuit-riding model, 43 communities are visited on a regular basis. PPEP utilizes press releases, posters, public service announcements in all local media (including 6 Spanish-language radio stations) and distribution of flyers through the La Voz del Campo network (8,000 statewide distribution) and at commodities distribution sites. PPEP also coordinates efforts with the Arizona Department of Economic Security, Migrant and Seasonal Farmworkers division.

#### CONTACT:



Portable Practical Educational Preparation, INC. (PPEP)  
802 East 46th Street  
Tucson, AZ 85713  
(602) 622-3553



## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **RAPS: Resource Apprenticeship Program for Students — A year round youth apprenticeship and mentoring program that introduces young people to fields in natural resource management**

**ORGANIZATIONS:** RAPS is a cooperative partnership among federal, state, and local resource agencies  
Bureau of Land Management  
U.S. Fish and Wildlife Service  
National Park Service  
U.S. Forest Service  
Environmental Protection Agency  
Alaska State Department of Natural Resources  
University of Alaska-Fairbanks  
Alaska Pipeline Service Company  
Department of Labor  
National Association of Private Industry Councils

**CHALLENGE:** Partnering with the National Association of Private Industry Councils (NAPIC), the Bureau of Land Management (BLM) determined to target disadvantaged youth and minority students who need alternatives and choices to assist them in school, work, and professional decisions. Under most circumstances, young people recruited for programs would not consider fields of natural resource management.

**DETAILS:** The BLM took the initiative six years ago by setting a long-range goal for land management agencies to take an active role in helping the nation's at-risk-youth become resource managers. These fields include land use planning, range science, wildlife biology, outdoor recreation, mineral engineering, land surveying and computer applications. The targeted youth are referred to the BLM and recruited from rural and urban area job training programs and schools.

The Resource Apprenticeship Program for Students (RAPS) objective is to support disadvantaged youth by providing orientation and the encouragement necessary to surmount poverty, poor educational opportunities and other social obstacles. RAPS is designed to provide students with an educational opportunity to become more involved in early career exploration through summer youth work experiences offered by the BLM in conjunction with school systems, private industry, and other federal and state agencies nationwide. However, it is also a "year-round" program that combines summer employment with continuing individual mentoring, a method by which advisors maintain contact with the participant and the participant's family and school.

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

The program encourages students to complete high school and to go on to college while offering practical work and educational experiences. *RAPS* provides youth-at-risk with field and or laboratory experiences designed to develop critical thinking skills and enhance interest in science, math, and written and verbal communication. The purpose of *RAPS* is to foster an awareness of natural resource management and to encourage higher education in resource-related careers.

#### RESULTS:

Beginning in 1987 with two Alaska Native youth, the program will have over 150 students enrolled in 1993.

#### CONTACT:



RAPS Program Coordinator, U.S. Department of the Interior — BLM  
Bureau of Land Management  
Denver Federal Center, BLDG 50  
390 Union Street, Suite 330  
PO Box 25047  
Denver, CO 80225-0047  
(303) 969-5698  
FAX (303)969-5696

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **SOS: Survival Opportunities for Street Kids**

**ORGANIZATION:** Community Youth Services  
Survival Opportunities for Street Kids (SOS)  
Olympia, Washington

**DETAILS:** The program offers a comprehensive range of services for youth with multiple barriers to employment. All participants live or have recently lived on the streets of Olympia, Washington. The program is a five-step process which includes participant assessment, life skills training in learning to make the transition to independent living, work maturity development in which participants train part time with public agency worksites, job placement into the private sector, and intensive follow-up and on-going support groups. If needed, participants are also provided access to drug and alcohol counseling in a local substance-abuse treatment program. The program received a Presidential Award for outstanding training after only its second year of operation.

**System Planning/Targeting:** The project was developed in response to community needs. Merchants and shoppers complained about the number of youth loitering on the streets in the downtown area of Olympia. SOS was designed to get out-of-school youth off the streets and into assessment and training, drug rehabilitation, and eventually job placement. The initial program design was coordinated with merchants and the PIC.

**Outreach:** Outreach is mostly hands-on — going to places on the street where youth can be found. Linkages with other agencies account for some referrals, but much of the outreach is done by word of mouth.

**Recruitment:** Agencies refer some applicants to the program, but the majority of recruitment is done by talking with youth by service providers while they are on the streets.

**CONTACT:**



Community Youth Services  
Survival Opportunities for Street Kids (SOS)  
824 5th Avenue SE  
Olympia, WA 98501  
(206) 943-0780

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**      **Youth Programs Focusing on Special Education and Handicapped Youth**

**ORGANIZATION:**    District IX, Human Resources Development Council  
Bozeman, Montana

**DETAILS:**          The District IX Human Resources Development Council operates a Title II Youth program which emphasizes services to special education and handicapped youth. The program works closely with the high school special education teachers and counselors who identify the youth. Participants are enrolled in a careers class funded by JTPA which meets five days a week during the school year and involves such areas as career awareness, self-esteem, budgeting and job shadowing. The core of the program is successful work experience placements which frequently result in permanent employment for older youth. Enrollment in this project is about 15-20 students per year, about half of whom are expected to enter full-time employment, as they will be completing school and employment is the next step. HRDC also targets special education students in two other high schools but, because of funding limitations, Bozeman is the only school that contains the entire module of training under this project.

**System Planning:** This project emanated from mutual interest and concern of the HRDC program director and school special education staff that the special education population had not been adequately targeted. The Statewide PIC saw this as a unique way to help a unique group. This was an existing program that the PIC decided to help fund. Many of the students in the project have already reached their educational plateaus for their mental capacity, so employment for them is the appropriate option. Preparing them for employment is the primary issue because many are not employable when they enter the program. The program builds basic work skills which enable them to find regular employment and to participate in the summer youth program in full-time jobs, which they would not be able to do without the work experience and skill building the program provides. Outcomes are approximately 40 percent placed in competitive employment, 25-35 percent enter the summer youth program, and 25-35 percent are placed in vocational rehabilitation workshops and other training facilities which target the special education population.

**Targeting:** The emphasis on serving handicapped and special needs youth is a good example of the intent of the proposed JTPA Amendments. That is, services are targeted to those most-in-need with multiple barriers to employment. The students are primarily in the 17-19 year old category. The only data actually used for targeting are school records.

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**Outreach:** Outreach was limited to the school districts only. The Bozeman vocational rehabilitation agency only works with out-of-school youth, and when they are contacted by in-school youth, they refer them to HRDC.

**Recruitment:** Students are assessed and evaluated for readiness for the program by HRDC and by the School District Special education teachers and vocational specialists, who also refer and select these students for the program.

**CONTACT:**



District IX, Human Resources Development Council  
321 East Main Street, Suite 300  
Bozeman, MT 59715  
(406) 587-4486



## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:**           **Center for Workforce Preparation**

**ORGANIZATION:** Northwest Washington Private Industry Council  
Bellingham, Washington

**DETAILS:** The Center houses: Job Training Partnership Act (JTPA); Employment Service; food stamps/employment and training; Job Opportunities and Basic Skills (JOBS); Adult Basic Education (ABE); and post secondary vocational education through the Bellingham Technical College. Services are targeted to serve JOBS clients, especially AFDC clients 23 years of age and under lacking a high school diploma and with limited or no work experience. Services at the Center include assessment and testing, basic educational skills training, life skills training, labor market information, vocational education, counseling concerning post secondary education choices and student financial aid. The Center provides a common delivery mechanism for the staff of any agency providing services to targeted populations. The Center is a model for the Job Training 2000 "one-stop shopping" concept.

***System Planning:*** The mission statement for the Center is to improve the educational skills, life skills, vocational and job opportunities for mutual clients.

The Center grew out of a growing desire on the part of human resource agencies in Bellingham to provide their clients with a more integrated human resource system. The College initiated a grant request through the Workforce Training and Education Coordinating Board and had the endorsement and support of the JTPA SDA, Regional and local ES offices, and the Department of Health and Human Services (welfare agency). The current Center space is donated by the SDA. The common link between the agencies was in the mutual clients they were assisting. The grant provides for the Center to serve any mutual clients of the supporting agencies. These are primarily AFDC clients who are enrolled in the JOBS program; the Center also serves those who are considered to be long-term unemployed. The outcomes are dependent on the needs of the clients, but as a minimum they seek to increase the basic skill levels by two grade levels and/or obtain GEDs for those clients with basic skills deficiencies. In addition, the Center will assist the clients' transition into vocational education or job placement assistance.

***Targeting:*** In selecting the targeted client group, no numbers-based research was done. In this case, the targeting was done on the basis of common clientele. A very significant part of the JTPA participants are AFDC/JOBS clients; the Employment Service chose the long-term unemployed as their main targeted group because of their rising numbers, the economic situation, and the growing concern that their lengthy unemployment was having on the family, social, and economic networks in the community. The Technical College was serving a large number of both groups as students.

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**Outreach:** As a joint enterprise, all four agencies meet to design better approaches to serving their common clientele in the Center, such as adopting a common intake document, using a common assessment form, and having their staffs knowledgeable about the services available at the Center.

**Recruitment:** Recruitment is done through a referral process from the individual agencies. All JTPA JOBS participants are involved since their participation originates through their eligibility for JOBS. Both the local ES office and the local welfare office have more clients in these target groups than are referred to the Center. Who is actually referred is based on a subjective selection process: those who the agency staff feel need a more supportive, directed environment which is richer in integrated support services available, and where there is more of a case management approach are referred to the Center; others are referred elsewhere.

**CONTACT:**



Northwest Washington Private Industry Council  
PO Box 2009  
Bellingham, WA 98227  
(206) 671-1660

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**EXAMPLE:** **Mississippi Delta Council for Farmworkers Opportunities**

**ORGANIZATION:** Mississippi Delta Council  
Clarksdale, Mississippi

**DETAILS:** The Mississippi Delta Council (MDC), a JTPA 402 grantee, provides services to migrant and seasonal farmworkers and their families who face barriers to employment. Services include CRT, OJT, work experience, GED preparation, employment and career counseling and supportive services (transportation, housing, food, child care, etc.). In addition, MDC provides limited non-financial services (primarily counseling and referrals) to other poor rural clients who are unemployed, underemployed or otherwise displaced from their jobs. MDC has provided summer employment each year on average to over 100 young people since 1977 in addition to providing recreational activities. The educational program has been considered as having positive values in its constant initiative to curtail youth crime and improve self-image. MDC was visited by a French Ambassador who reviewed its literacy classroom sites and used the information as a model to assist in improving classrooms in Africa. MDC commits at least \$100,000 of its Section 402 funds per program year to assist the migrant in-school youth population. MDC plans to serve 1200 - 1300 clients annually; 600 will receive supportive services and 320 will be placed in jobs.

**System Planning:** The determination to select the migrant and seasonal farmworkers target group stems from the agency mission: it is the 402 agency, hence its target population is pre-selected based on the scope of its funding source. It is a statewide agency but its efforts are concentrated in 39 counties, and particularly within six multi-county consortia.

The outcomes are aimed at completion of a general education and GED preparation and assistance with placements in the local community and technical colleges. Job placements are primarily in non-farm occupations. A limited amount of relocation assistance is available.

**Targeting:** The data used by the agency to determine the size of the targeted population comes from monthly Employment Service reports, Mississippi State Agriculture Extension Department, and in-house surveys.

**Outreach:** Outreach efforts are extended to county welfare offices, local ES offices, community and technical colleges, and the local educational districts.

## PROJECT SPECIFIC EXAMPLES

### WORKING EXAMPLES TO CONSIDER

**Recruitment:** Recruitment is done by use of a "reserve list." This is a list of 25-30 eligible and available people who have been referred to the agency or walked in on their own. An eligibility screening is performed; those determined eligible are added to the list. The list is updated every 60 days. People are contacted from the list as slots become available, at which time a complete eligibility determination and assessment are made.

**CONTACT:**



Mississippi Delta Council  
1005 State Street  
Clarksdale, MS 38614  
(601) 627-1121

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A P P E N D I X





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## ► CONTRIBUTORS TO PROJECT TOR COMPREHENSIVE RESOURCE GUIDE

*We would like to thank the following organizations and their staff for their time, energy, and contributions. Some responded to our questionnaires which created the basis for this Guide. Others called or sent valuable information about special projects, ongoing efforts, and other experiences with targeting, outreach, and recruitment activities they thought might be useful for their colleagues. And others assisted us by reviewing the Guide to assure that it would be the practical, user-friendly tool SDAs across the country requested. If you contributed to the Guide and do not see your name on this list...a special thanks to you, our unsung heroes!*

Alaska Department of Labor, Anchorage, Alaska  
 Albuquerque/Bernalillo County Consortium, Albuquerque, New Mexico  
 Area VII Job Training Administration, Waterloo, Iowa  
 Belltown Homeless Employment Project, Seattle, Washington  
 Bozeman District IX Human Resource Development Council, Bozeman, Montana  
 Broward Employment Training Administration, Ft. Lauderdale, Florida  
 Capitol Area Private Industry Council, Raleigh, North Carolina  
 Career Works of Santa Cruz County, Santa Cruz, California  
 Central Oklahoma Private Industry Council, Oklahoma City, Oklahoma  
 Central Wisconsin Private Industry Council, Wisconsin Rapids, Wisconsin  
 City of West Hollywood, Community Development Department, Hollywood, California  
 Clackamas County Employment and Training Business Services, Marylhurst, Oregon  
 Community Services Consortium, Corvallis, Oregon  
 Coosa Valley Rural Development Corporation, Rome, Georgia  
 CSRA Employment and Training Consortium, Augusta, Georgia  
 Cuyahoga County Department of Employment Services, Cleveland, Ohio  
 Dekalb County Private Industry, Decatur, Georgia  
 Department of Employment, New York, New York  
 Department of Geography, University of Florida, Gainesville, Florida  
 District IX Human Resources Development Council, Bozeman, Montana  
 Duluth Job Training Programs Division, Duluth, Minnesota  
 East County Employment and Training Center, Gresham, Oregon  
 GLEAMS Upper Savannah Council of Governments, Greenwood, South Carolina  
 Governor's Employment and Training Forum, Bismarck, North Dakota  
 Houston Works, Houston Job Training Partnership Council, Houston, Texas

## A P P E N D I X

Jackson State Community College, JTPA Administrative Office, Jackson, Tennessee  
Job Service of North Dakota, Bismarck, North Dakota  
Job Training and Employment Corporation, New Bedford, Massachusetts  
Joint Training Partnership of Southeast Ohio, Cambridge, Ohio  
Kellogg Job Service, Kellogg, Idaho  
Kitsap County Job Training Center, Bremerton, Washington  
La Cooperative, Sacramento, California  
Lewiston Idaho Job Services JTPA, Lewiston, Idaho  
Los Angeles County Private Industry Council, Los Angeles, California  
Macomb & St. Clair Private Industry Council, Mt. Clemens, Michigan  
Merced County Private Industry Council, Merced, California  
Michigan Indian Employment and Training Services, Inc., Holt, Michigan  
Mid-Columbia Employment and Training, The Dalles, Oregon  
Mid-Willamette Job Council, Salem, Oregon  
Montana JTPA, Helena, Montana  
Mountainlands Associations of Governments, Provo, Utah  
National Association of Counties, Washington, D.C.  
National Commission for Employment Policy, Chapel Hill, North Carolina  
New York City JTPA Coalition of Adult Contractors, New York, New York  
North Central Pennsylvania Regional Plan and Development Commission, Ridgway, Pennsylvania  
Northeast Women's Center, Denver, Colorado  
Northwest Arkansas EED, Inc., Job Training Program, Harrison, Arkansas  
Northwest Washington Private Industry Council, Bellingham, WA  
Oakland Private Industry Council, Oakland, California  
Office of Employment and Training, Towson, Maryland  
Office of Human Resources - Job Training Program, City and County of Honolulu, Hawaii  
Office of Human Resources, Honolulu, Hawaii  
Operation Able, Chicago, Illinois  
Oswego County SDA 25, Fulton, New York  
Panhandle Area Council, Hayden, Idaho  
PIC of Southern Connecticut, Inc., Bridgeport, Connecticut  
Pinellas Private Industry Council, Clearwater, Florida  
Pittsburgh Partnership, Pittsburgh, Pennsylvania  
Portable Practical Educational Preparation, Inc. (PPEP)  
Private Industry Council 5, Annandale, Minnesota  
Private Industry Council, Columbus, Ohio  
Private Industry Council, Inc., Ogden, Utah  
Private Industry Council of Columbus & Franklin Counties, Inc., Columbus, Ohio  
Private Industry Council of Connecticut, Inc., Bridgeport, Connecticut  
Private Industry Council of Northern Cook County, Des Plaines, Illinois  
Private Industry Council of Riverside County, Riverside, California



## A P P E N D I X

Riverside County PIC, Riverside, California  
Rural Coastal Bend Private Industry Council, Beaville, Texas  
San Diego Consortium and Private Industry Council, San Diego, California  
Santa Clara County JTPA, San Jose, California  
SDA #7 — Job Training Administration, Waterloo, Iowa  
Seattle-King County Private Industry Council, Seattle, Washington  
Shasta County Private Industry Council, Redding, California  
Shenandoah Valley Private Industry Council, Harrisonburg, Virginia  
Six County Consortium for Employment and Training, Escanaba, Michigan  
Southeastern Utah Association of Local Government, Price Utah  
Southwest Minnesota Private Industry Council, Marshall, Minnesota  
Southwest Washington Private Industry Council, Vancouver, Washington  
Southwestern Wisconsin Private Industry Council, Inc., Dodgeville, Wisconsin  
State of Wisconsin, Department of Industry, Labor and Human Relations, Madison, Wisconsin  
Suffolk County Labor Department, Smithtown, New York  
Summer Youth Employment Office, Toledo, Ohio  
Survival Opportunities for Street Kids (SOS), Olympia, WA  
Tarrant County Private Industry Council, Fort Worth, Texas  
Tecumseh Consortium, Springfield, Ohio  
Toledo Area Private Industry Council, Toledo, Ohio  
The Center for Education and Training for Employment, Ohio State University, Columbus, Ohio  
The Job Council, Medford, Oregon  
The New Hampshire Private Industry Council, Concord, New Hampshire  
The Orange County Private Industry Council, Santa Ana, California  
The Oregon Consortium and The Oregon Private Industry Council, Inc., Albany, Oregon  
The Palm Beach County Private Industry Council, West Palm Beach, Florida  
The Private Industry Council, Portland, Oregon  
The Private Industry Council, Inc., Portland, Oregon  
The Private Industry Council of Lake County, Waukegan, Illinois  
The Private Industry Council of Louisville and Jefferson County, Inc., Louisville, Kentucky  
The Private Industry Council of Philadelphia, Philadelphia, Pennsylvania  
The Private Industry Council of Westmoreland/Fayette, Inc., Greensburg, Pennsylvania  
Umpqua Training and Employment, Inc., Roseburg, Oregon  
U.S. Department of the Interior, Bureau of Land Manager, OEO, Washington, DC  
Veteran's Administration, North Chicago, Illinois  
Western Wisconsin Private Industry Council, La Crosse, Wisconsin  
Wood County Office of Education, Bowling Green, Ohio  
Yakima County Department of Employment & Training, Yakima, Washington  
Young Women's Christian Association, Great Falls, Montana  
Yuma Private Industry Council, Yuma, Arizona

# **► DEPARTMENT OF LABOR REGIONAL OFFICE TOR CONTACTS**

## **Region I**

**GEORGE DAVIS**  
U.S. Department of Labor  
Employment and Training Administration  
One Congress Street, 10th Floor  
Boston, MA 02114  
TEL: (617) 565-2246  
FAX: (617) 565-2023

## **Region II**

**CYNTHIA SMILLIE**  
U.S. Department of Labor  
Employment and Training Administration  
201 Varick Street, Room 755  
New York, NY 10004  
TEL: (212) 337-2175  
FAX: (212) 337-2144

## **Region III**

**BARRY BRIDGE**  
U.S. Department of Labor  
Employment and Training Administration  
P.O. Box 8796  
3535 Market Street, Room 13300  
Philadelphia, PA 19104  
TEL: (215) 596-6353  
FAX: (215) 596-0683

## **Region IV**

**MARY SMARR**  
U.S. Department of Labor  
Employment and Training Administration  
1371 Peachtree Street, N.E., Room 400  
Atlanta, GA 30367  
TEL: (404) 347-3495  
FAX: (404) 347-3341

## **Region V**

**NOLA PENN**  
U.S. Department of Labor  
Employment and Training Administration  
230 South Dearborn Street, Room 628  
Chicago, IL 60604  
TEL: (312) 353-5063  
FAX: (312) 353-0127

## **Region VI**

**FELECIA AYCOCK**  
U.S. Department of Labor  
Employment and Training Administration  
525 Griffith Street, Room 317  
Griffin and Young Streets,  
Dallas, TX 75202  
TEL: (214) 767-6919  
FAX: (214) 767-4681

## **Region VII**

**FRED HOMAN**  
U.S. Department of Labor  
Employment and Training Administration  
Federal Office Building  
911 Walnut Street, Room 700  
Kansas City, MO 64106  
TEL: (816) 426-3796  
FAX: (816) 426-7218

## **Region VIII**

**KATHY HARRIS**  
U.S. Department of Labor  
Employment and Training Administration  
1961 Stout Street, Room 1668  
Denver, CO 80294  
TEL: (303) 844-4143  
FAX: (303) 844-4928

## **Region IX**

**DANA DUFEE**  
U.S. Department of Labor  
Employment and Training Administration  
Stevenson Place  
71 Stevenson Street, Suite 830  
San Francisco, CA 94105  
TEL: (415) 744-7648  
FAX: (415) 744-6225

## **Region X**

**TOR TEAM**  
U.S. Department of Labor  
Employment and Training Administration  
1111 Third Avenue, Suite 900  
Seattle, WA 98101  
TEL: (206) 553-7700  
FAX: (206) 553-0098



## ► PROJECT TOR CUSTOMER FOCUS PANEL

*The following JTPA colleagues provided their expertise from the inception of Project TOR through review of the final draft. We thank them for their commitment to this project.*

**FELECIA AYCOCK**

Department of Labor - ETA  
525 Griffin Street, Room 315  
Dallas, TX 75202

**KATHY CASELLA**

Department of Employment and  
Training, County of Oswego  
200 North 2nd Street  
Fulton, NY 13126

**DENNIS COLE**

The Private Industry Council  
720 S.W. Washington, Suite 250  
Portland, OR 97205

**JO COLLINS**

Oregon City Employment Division  
P.O. Box 71  
Oregon City, OR 97045

**CAROLYN CONRADUS**

Seattle-King County Private Industry  
Council  
2001 Western Avenue, Suite 250  
Seattle, WA 98121

**EMILY DUNCAN**

Private Industry Council of  
Snohomish County  
917 134th Street, S.W., A-10  
Everett, WA 98204

**JIM FLOWERS**

North Idaho Private Industry Council  
11100 Airport Drive  
Hayden, ID 83835

**ALICIA HAYS**

Southern Willamette Private Industry  
Council  
78 "B" Centennial Loop  
Eugene, OR 97401

**JACKIE HEUSER**

New Hampshire Job Training Council  
64-B Old Suncook Road  
Concord, NH 03301

**MARTHA MUIRHEAD**

Department of Labor  
200 Constitution Avenue N.W.  
Room N-2305, Frances Perkins Bldg.  
Washington, DC 20210

**MIKE PORTER**

Northwest Washington PIC  
2021 E. College Way  
Mt. Vernon, WA 98273

**CAMILLE PREUS-BRALY**

Oregon Workforce Quality Council  
225 Winter Street, NE  
Salem, OR 97310

**LARRY SANCHEZ**

Oregon Human Development Corp.  
9620 S.W. Barber Blvd., Suite 110  
Portland, OR 97219

**L.N. (PIXIE) TOLIVER**

South Coast Business Employment  
Corp.  
P.O. Box 1118  
Coos Bay, OR 97420

**JANET TOLMAN**

Washington State JTPA  
P.O. Box 9046  
Olympia, WA 98507